

Nomination form

For an adult dependant pension

On the death of a member of the BT Pension Scheme (BTPS), a pension is generally payable to a surviving spouse or civil partner.

This form allows you to nominate someone to be considered for an adult dependant pension in the event of your death, **if you do not have a spouse or civil partner**. This person must be wholly or partly financially dependent on you.

Please read the important notes section before sending this form to us. Alternatively, you can make your nomination online by logging in to the member portal at btps.co.uk.

You must complete **ALL THREE** sections of the form and return it to: BT Pension Scheme (BTPS), Sunderland, SR43 4AD.

Section 1: Your personal details (Please complete in BLOCK CAPITALS)

Please provide your personal details so the Trustee can store this information with your member record.

Full name
<input type="text"/>
Your National Insurance Number
<input type="text" value="A"/> <input type="text" value="A"/> <input type="text" value="1"/> <input type="text" value="2"/> <input type="text" value="3"/> <input type="text" value="4"/> <input type="text" value="5"/> <input type="text" value="6"/> <input type="text" value="A"/>
BTPS Membership number
<input type="text"/>
Date of birth
<input type="text" value="D"/> <input type="text" value="D"/> <input type="text" value="M"/> <input type="text" value="M"/> <input type="text" value="Y"/> <input type="text" value="Y"/> <input type="text" value="Y"/> <input type="text" value="Y"/>

Section 2: Your nomination (Please complete in BLOCK CAPITALS)

You may only nominate one adult dependant. I hereby nominate:

Name and address	Relationship to you	Date of Birth
<input type="text"/>	<input type="text"/>	<input type="text"/>

Section 3: Your signature and declaration

I declare that the information I have provided in this form is true and correct.

I understand that where the application is made for an adult dependant pension it will be acknowledged in writing and retained. I further understand that the eligibility of my nominated dependant for an adult dependant pension will only be considered upon my death, in accordance with the requirements of the BTPS Rules and applicable legislation and that, even if the financial conditions are met, the payment of an adult dependant pension is at the absolute discretion of the Trustee.

This Nomination form supersedes any previous nominations made by me and I reserve the right to revise this nomination at any time by submitting a new form to the Trustee.

Data Protection

BTPS, the Administrator of the BT Pension Scheme, will process the personal data you provide in this form on behalf of the BTPS Trustee, who will be the data controller of your personal information under The UK General Data Protection Regulation ("UK" GDPR), Data Protection Act 2018 ("DPA 2108") and any other applicable Data Protection Laws.

BTPS, on behalf of the Trustee, will process your personal data for the purposes set out in this form and it will share your personal data with third parties including, the professional secretariat to the Trustee to administer the BT Pension Scheme. This will not involve any transfer of your personal data outside of the European Economic Area.

By signing below, I understand that:

- I understand that I am providing the Trustee with personal data, and possibly sensitive personal data, within the definition of The UK General Data Protection Regulation ("UK" GDPR) and Data Protection Act 2018 ("DPA 2108").
- By signing this form, I also consent explicitly to the Trustee (and any other data processors and controllers it uses) processing any personal data and any sensitive personal data about me for any purposes associated with my pension. This information may be transferred to third parties who advise or assist the Trustee.
- Where I disclose to the Trustee personal data relating to the adult dependant nominated, as agent on behalf of that individual, I give consent on their behalf and have informed them of the identity of the Trustee as the data controller in relation to their data and the purpose (as set out above) for which their personal data will be processed.

Name (BLOCK CAPITALS)

Signature

Date

Important Notes

This form should only be completed by you as a member of the Scheme. This form will be treated in the strictest confidence and will normally be looked at by the Trustee in the event of your death.

When should I make a nomination?

If you were leaving no surviving spouse/civil partner, but financially supporting another adult, it may be appropriate for you to nominate that person to be considered by the Trustee to receive an adult dependant's pension.

The payment of any adult dependant pension is at the absolute discretion of the Trustee. Your nomination does not guarantee the payment of a pension. However, your nomination is a useful guide to the Trustee and ensures the person you nominate is considered for a pension.

An adult dependant is someone who, in the opinion of the Trustee, was wholly or partly financially dependent on you at the time of your death.

It is possible, where certain conditions are met, for the Trustee to pay a pension to someone who they judge to be wholly or partly financially dependent on you at the date of your death without having received a nomination.

Who can be nominated as an adult dependant?

The Scheme rules define a dependant for this purpose as an adult person who was, in the opinion of the Trustee, wholly or partly financially dependent on the member, at the date of death. Subject to such financial dependence, the range of persons to whom an adult dependant's pension could be paid might include:

- A relative, including a child of 18 or over who is physically or mentally incapable of self support and who might otherwise receive, at the Trustees discretion, an incapacitated child's pension.
- A common-law wife or husband.
- Any individual with whom the member has an established inter-dependent relationship. (This may include a relationship with a member of the same sex).

The Trustee will not normally authorise payment of an adult dependant pension to a mentally capable and able-bodied young person who happens to be still living at home with parents.

If you are considering making a nomination you should bear in mind that children's pensions are payable at a higher rate if there is no spouse/civil partner's or adult dependant pension payable.

What does 'financially dependent' mean?

A person may be considered wholly or partly financially dependent on you if, for example:

- They share living expenses with you;
- They receive financial support from you;
- Their standard of living would be affected by the loss of your contribution or support.

For example, someone whose position may be temporarily improved by periodic gifts from you may not qualify.

Assessing financial dependency needs to be done carefully by the Trustee and after reviewing suitable evidence. This is both to comply with the Rules and to ensure that the payment is of a type permitted by HM Revenue and Customs. The Scheme will, therefore, request evidence of financial dependency from your nominated dependent after your death.

Please note: Section C Rules state that the Trustee has the discretion to decide whether the dependant's pension should be reduced if the adult dependant is more than 10 years younger than the member. This does not apply within the Section A and B Rules.

How much would the pension be?

The amount will be calculated in the same way as a pension for a spouse or civil partner.

Important notes

What happens if my circumstances change?

You can withdraw your nomination at any time by writing to the address overleaf, quoting your full name, date of birth and either your National Insurance number or membership number. Alternatively, you can either make a new nomination online, which you can do on the member portal by logging in at btps.co.uk, or by completing a new Nomination form and returning it to us.

Please note: any nomination is automatically cancelled if you marry or enter into a civil partnership.

For full details about the adult dependant pension, see your Scheme booklet, the BTPS member portal or the latest Rules (available on request from BT Pension Scheme Member Services).

Your benefits are always subject to the BTPS Rules and relevant legislation. If there's any difference between the description of benefits in this document and the BTPS Rules or legislation, the BTPS Rules and legislation will take precedence.

Contact us

We have a dedicated team on hand to support you. If you have any questions about anything included in this form, please get in touch:

Talk to us: **0800 731 1919**
(Monday – Friday 8:30am until 5:00pm)
+44 (0) 20 3023 3420 (international)

Email us: member@btps.co.uk

Write to us: **BT Pension Scheme (BTPS),
Sunderland, SR43 4AD**

Visit: www.btps.co.uk