

## Moneybox Pension Beneficiary Claim Form (<75)

Please complete and return this form to us.

### Your Details

Name:																			
Details of the account into which you wish to receive payment:  Sort code: <table border="1" style="width: 100%; height: 20px;"> <tr> <td style="width: 20px;"> </td> <td style="width: 20px;"> </td> <td style="width: 20px;"> </td> <td style="width: 20px;"> </td> <td style="width: 20px;"> </td> <td style="width: 20px;"> </td> <td style="width: 20px;"> </td> </tr> </table> Account number: <table border="1" style="width: 100%; height: 20px;"> <tr> <td style="width: 20px;"> </td> <td style="width: 20px;"> </td> <td style="width: 20px;"> </td> <td style="width: 20px;"> </td> <td style="width: 20px;"> </td> <td style="width: 20px;"> </td> <td style="width: 20px;"> </td> <td style="width: 20px;"> </td> <td style="width: 20px;"> </td> <td style="width: 20px;"> </td> </tr> </table>																		Account name: <table border="1" style="width: 100%; height: 20px;"> <tr> <td> </td> </tr> </table> <i>(Please note the account must be in your name)</i>	

### Claim Details

I wish to receive my benefit as:  <input type="checkbox"/> Lump sum	<i>The Lifetime Allowance used by your chosen event will be shared with the Legal Personal Representatives after payment is made.</i>
---	---

### Checklist

Please provide the following supporting documents:  <input type="checkbox"/> A certified copy of your ID (such as a passport or driving license)  <input type="checkbox"/> Evidence of your bank details (such as a statement)	<i>This is required for us to verify your identity.</i>  <i>Required in order to verify the payment details.</i>
--	--

## Declaration

In this declaration:

'I', 'me' refers to you, the individual named in the personal details section of this form, and 'Moneybox', or 'we' refers to Digital Moneybox Limited as the provider and scheme administrator of the Moneybox Personal Pension.

'Dependant' and 'Dependants' means a dependant, nominee or successor of the deceased.

I hereby declare, confirm and agree that:

1. The information I have provided in this form is correct and complete to the best of my knowledge. If further tax becomes payable because the information I have provided is proven to be incorrect then I understand that I will be wholly and personally liable for the tax charge due and any resultant penalty as may be imposed by HMRC.

2. I request the payment of death benefits as set out in this form and agree that:

i. I understand that once the death benefits have been settled Moneybox shall be released of all liability in respect of the death benefits due to me from the Moneybox Personal Pension.

ii. I am aware that Moneybox may make searches at credit or electronic reference agencies, for the purpose of verifying my identity. I am also aware that the credit reference agencies will record details of the search whether or not my application is successful and that this is not a credit check and will not be used or seen by lenders to assess my ability to obtain future credit.

iii. I have not been given or received advice from Moneybox.

Signature:

Date:

Print name: