



Local Government Pension Scheme (LGPS)
Surrey Pension Fund

Death Grant – Expression of Wish form

(2023 v1)

This form has been designed for members of the Local Government Pension Scheme to name a beneficiary or beneficiaries to receive the lump sum death grant payable in the event of their death.

Please read the notes at the end of before completing this form

Section 1 – Your personal details

Required information	Answer
Title:	
Forename:	
Surname:	
Your home address:	
Postcode:	
National Insurance number:	
Date of birth (dd/mm/yyyy):	
Email address:	
Daytime phone number:	

Section 2 – Details of your beneficiaries

Name	Address	Relationship to you (if any)	Percentage share (%) - Total 100%

Section 3 – Declaration

In the event of my death, I wish that any death grant is paid to the beneficiary / beneficiaries named in Section 2 in the proportions stated. I confirm that I have read and understood the explanatory notes at the end of this form.

Required information	Answer
Signed:	
Date (dd/mm/yyyy):	

Explanatory notes

The amount of tax-free lump sum death grant for a contributing member of the Local Government Pension Scheme (LGPS) is normally equal to three years' pensionable pay. If you are a contributing member, a death grant is payable no matter how long you have been a member of the scheme provided you are under age 75 at the date of death.

If you have a deferred benefit and / or a pension in payment from a previous period of LGPS membership, the death grant will be any lump sum payable in respect of those benefits **or** the death in service lump sum of three times your final pensionable pay, whichever is the greater.

- It is possible to name any number of individuals or incorporated or unincorporated organisations to receive the death grant.
- When completing the **Expression of Wish form**, please make sure that the 'percentage share' column in section 2 is completed for each individual beneficiary (even if you are naming only one) and that the sum of the percentage shares equals 100%.
- If you want to name more than five beneficiaries, please provide their details on a separate signed sheet of paper and attach it to this form.
- The named beneficiary/ies can be changed at any time simply by completing another **Expression of Wish form**, which can be sent on request or can be downloaded from the Surrey Pension Fund website at www.surreypensionfund.org
- The Council retains absolute discretion to decide whom any death grant is paid to. Having this discretion means the potential liability for the assessment of inheritance tax on the value of the grant will be avoided. The Council will of course have the greatest regard to your wishes in respect of the payment of the grant.
- Naming your beneficiary/ies will usually allow the Council (as the Administering Authority) to pay the death grant quickly and without the need to wait for your estate to be settled and Probate obtained.
- If the Council has been unable to pay the grant within two years of the date of your death, the grant will form part of your estate and payment will be made to your personal representatives.

Please return the completed form:

In writing to –

Surrey Pension Team
PO Box 465,
REIGATE, RH2 2HA

Or email a scanned copy to: lgps.forms@surreycc.gov.uk

Further information about the LGPS can be found:

On the national members' website - www.lgpsmember.org

On the pension fund website - www.surreypensionfund.org

If you have questions about this form or about the LGPS, please contact the Customer Relationship Team:

By phone (9am to 4pm) - **0300 200 1031**

This is not the form to nominate a co-habiting partner to receive a pension in the event of your death. A form for this purpose can be found on the Surrey Pension Fund website.