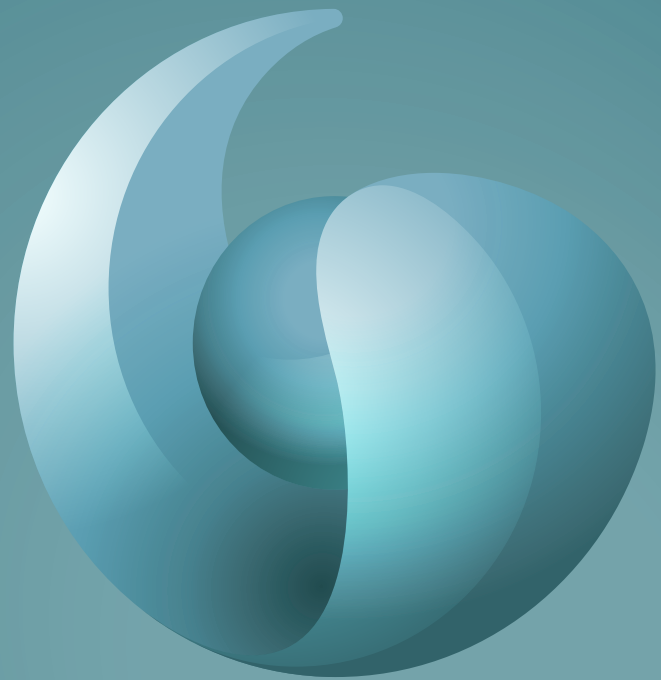


# iPensions Group Member Notification of Death Form



# iPensions Group Scheme Member Notification of Death Form

At iPensions Group, we will do everything we can to give you the support and assistance you need when dealing with bereavement and the financial responsibilities that follow.

If you need to notify us about the death of an iPensions Group scheme member, please fill this form accurately and email it with all listed supporting documents to [sipp@ipensionsgroup.com](mailto:sipp@ipensionsgroup.com). Alternatively call our customer services team on 0161 972 2840 if you wish to discuss anything else.

This form must be completed by the person notifying us of the death of the iPensions Group scheme member.

Gathering and providing us with all the required details together in one email will reduce the number of correspondences we have with you during this difficult time.

## 01. Deceased Member Details

Full Name

Date of Birth (DD/MM/YY)

Date of Death (DD/MM/YY)

UK National Insurance Number

Last Residential Address

Pension Reference Number

## 02. Details of notifier and anyone else involved in the process

	Full Name	Relationship to Deceased	Email Address	Phone
Executor *				
Executor *				
Executor *				
Administrator *				
Personal Representative*				
Solicitor				
Other				

\* Where you provide details of more than one Executor, Administrator or Personal Representative or any combination, you confirm that you have individual's consent to share their details with us and you allow us to correspond with all named parties as Joint Executors.

### 03. Potential Beneficiaries

Please provide details of the surviving spouse, civil partner, any dependents with their age or any others potential beneficiaries for consideration.

Full Name	Relationship to Deceased	Date of Birth	Email Address	Phone Number	Additional details we need to know

### 04. Document Checklist (please tick)

**For the deceased iPensions Group member, please provide:**

- Certified copy of Death Certificate
- Certified copy of the Will (if applicable)

**For each person listed in Section 2, please provide certified copies of:**

- Proof of identity
- Proof of address
- Any additional supporting documentation

This section is continued overleaf.

## 04. Document Checklist (continued) (please tick)

For each potential beneficiary listed in Section 3, please provide certified copies of:

- Proof of identity
- Proof of address
- Marriage certificate / Civil Partnership certificate / Evidence of relationship to deceased
- Any additional supporting documentation to help us process the claim efficiently

Information on who can certify the documents and what is acceptable as proof of identity and proof of address is available [here](#) and [here](#).

## 05. Processing Fees

Processing iPensions Group scheme member death claim including processing of the documents, decision and the distribution of death benefits fall outside of the standard annual pension administration fees.

There is a minimum charge of £500 plus VAT that will be taken from the SIPP prior to the distribution of benefits to the beneficiaries. The Fee will be greater where there are multiple beneficiaries or the identification of beneficiaries is more complex.

## 06. Declaration

I confirm that the information provided in this form is accurate and complete to the best of my knowledge.

Signature

Printed Name

Signing in Capacity As

Date

## Submission Details

Please email this completed form and all supporting documents to [sipp@ipensionsgroup.com](mailto:sipp@ipensionsgroup.com)

If you have any questions or difficulty in completing this form, please contact our customer services team on 0161 972 2840.