

## NHS Pensions - Lump sum on death benefit nomination (DB2)

### Notes

Please read these notes before completing the lump sum on death benefit nomination form.

### Important

Please be aware that the form will be rejected and you will need to complete a new form if:

- you have not initialled and dated any amendments you have made
- any mandatory information is missing

You may use this form **only** if you have pensionable membership on or after 1 April 2008 in the NHS Pension Scheme. If your pensionable membership ends before 1 April 2008 refer to form DB1. Your pensionable membership may have started before 1 April 2008 but providing you have pensionable membership on or after 1 April 2008 you can complete this form.

**If you want your spouse or registered civil partner to receive 100% of your lump sum on death benefits you do not need to complete this form, as they will receive it automatically, unless you have previously nominated someone else to receive it.**

If you have nominated your partner to receive an adult dependant's pension by completing a partner nomination form (PN1), once all eligibility for the adult dependant's pension has been established they will also receive 100% of the lump sum on death benefit unless you nominate someone else to receive the lump sum payment on a DB2.

You may change your lump sum on death benefit nomination by either:

- submitting a new application (DB2) to nominate someone else
- cancelling an existing one using form NOM 1 to enable your new spouse / registered civil partner to receive 100% of the lump sum on death benefit automatically

A new nomination will replace an existing one automatically.

You can nominate as many people as you like, or alternatively one organisation. An organisation must be one of the following:

- a body corporate
- an unincorporated body
- your legal personal representative(s)

An individual nomination will not be valid, if at the time of your death:

- a previous nomination has been revoked
- a nominee has died
- a nominee has been convicted of your murder or manslaughter
- the nominee cannot be traced

In these circumstances, their proportion of the lump sum will be paid to your estate. If the nominee is a child, or is awaiting confirmation of their National Insurance number, please do not delay the return of the completed form. You should write to us at a later date confirming the National Insurance number.

**Please ensure you inform us of any change of address of your nominee(s).**

The lump sum on death benefit must be paid within two years of the date upon which the Scheme Administrator was first notified of your death otherwise it will be subject to a HM Revenue & Customs (HMRC) tax charge of up to 45%. NHS Pensions has no discretion and must deduct this tax charge from the lump sum.

If you nominate more than one individual select either 'equal share' or enter the proportion, as a percentage of the total benefits each individual should receive, where indicated on the form. **The total of the proportions must equal 100%.**

**Important Note:** If you are completing the lump sum on death benefit nomination in favour of your partner and want them to receive an adult dependant's pension when you die, you should complete a 'Partner Nomination Form' PN1 (please read the notes before completing the form). Forms PN1, NOM1, DB1 and DB2 are available from our website [www.nhsbsa.nhs.uk/nhs-pensions](http://www.nhsbsa.nhs.uk/nhs-pensions)

### **How we use your information**

For more information about how the NHSBSA processes your personal data, see our privacy notice - [www.nhsbsa.nhs.uk/our-policies/privacy/nhs-pensions-privacy-notice](http://www.nhsbsa.nhs.uk/our-policies/privacy/nhs-pensions-privacy-notice)

## NHS Pensions - Lump sum on death benefit nomination

To be completed by the applicant in all cases

### Part 1- Personal details

Please type in the fields below then print off and sign, or print and complete in CAPITAL LETTERS using BLACK INK  
(All fields marked with \* are mandatory)

\* Title (Mr, Mrs, Miss, Dr)

\* Surname

\* First names

SD number

\* National Insurance number

\* Date of birth

\* Address

Post code

Contact telephone number

Email address

Gender

☐

Male

☐

Female

### Part 2 - Nominee details

Complete Section 2.1 for individual nominee details OR 2.2 for organisation or legal personal representative(s). DO NOT COMPLETE BOTH.

#### Part 2.1 - Individual nominee details - \* fields are mandatory

\* Title (Mr, Mrs, Miss, Dr)

\* Surname

\* First names

\* Date of birth

\* Relationship to member (if any)

\* Address

Post code

Contact telephone number

Email address

Gender

☐

Male

☐

Female

\* Tick this box for an equal share ☐

or enter a proportion of the total in this box

%

**Individual nominee details (continued) \* fields are mandatory**

\* Title (Mr, Mrs, Miss, Dr)

\* Surname

\* First names

\* Date of birth

			/				/				
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\* Relationship to member (if any)

\* Address

Post code									

Contact telephone number

Email address

Gender

☐

Male

☐

Female

\* Tick this box for an equal share ☐

or enter a proportion of the total in this box

%

**Individual nominee details (continued)**

\* Title (Mr, Mrs, Miss, Dr)

\* Surname

\* First names

\* Date of birth

			/				/				
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\* Relationship to member (if any)

\* Address

Post code									

Contact telephone number

Email address

Gender

☐

Male

☐

Female

\* Tick this box for an equal share ☐

or enter a proportion of the total in this box

%

**Individual nominee details (continued)**

\* Title (Mr, Mrs, Miss, Dr)

\* Surname

\* First names

\* Date of birth

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\* Relationship to member (if any)

\* Address

Post code									

Contact telephone number

Email address

Gender

☐

Male

☐

Female

\* Tick this box for an equal share ☐

or enter a proportion of the total in this box

%

Please download this page again if required

**Part 2.2 - Organisation or legal personal representative nominee details.**  
**Not to be completed if Part 2.1 has been completed - \* fields are mandatory**

\* Name of organisation or personal representative

\* Company registration number (if applicable)

\* Address

\* Post code

**Part 3 - Declaration**

- ☐ I would like the individual(s) or organisation named on this form to receive any lump sum on death benefit payable upon my death. I confirm that any previous nominations I have made are cancelled in favour of this one.
- ☐ I consent to the disclosure of information on this form for the purposes of verification and in compliance with the Data Protection Act, to and from other organisations.
- ☐ I understand that the administration of NHS Pensions and responsibility for counter fraud and security management (NHS Protect) in the NHS are both responsibilities of the NHS Business Services Authority (NHSBSA).
- ☐ I understand that NHS Pensions may share information on this form with NHS Protect for the purposes of prevention, detection, investigation and prosecution of fraud or any other unlawful activity affecting the NHS.
- ☐ I understand that if I provide NHS Pensions with false or misleading information, I may be liable to criminal, civil and/or disciplinary proceedings

\* Signature

\* Date

**Part 4 - Checklist**

**MUST BE COMPLETED BY THE MEMBER BEFORE SENDING THE FORM**

**We cannot accept a form incorrectly completed**

- ☐ Any amendments have been initialled and dated
- ☐ Only Part 2.1 OR Part 2.2 has been completed
- ☐ The spouse / registered civil partner is **NOT** the only nominee in part 2 (refer to notes)
- ☐ ALL mandatory boxes have been completed

If we require any further information regarding your nomination how would you prefer to be contacted.  
Please select one option:

Telephone ☐ Email ☐ Letter ☐

**Please send this completed form to:**

NHS Pensions  
PO Box 683  
Unit 5  
Newcastle upon Tyne  
NE5 9EE