

Occupation

Employment Status

Country of Residence

Date of Residence

SECTION 4. ANY OTHER INFORMATION CHANGES YOU NEED TO NOTIFY THE TRUSTEES OF?

Please complete updated information:

SECTION 5. CHANGE TO YOUR NOMINATED BENEFICIARIES

Benefits from your pension would normally be paid at the discretion of the Trustees by you nominating who you would like to receive your pension benefits in the event of your death. Where this is the case, Inheritance Tax will not apply. You can nominate multiple people and indicate the percentages for each. This nomination can be changed at any time by writing to Heritage Pensions Limited.

Full Name	Address	Relationship to Member	% of Death Benefits

SECTION 6. MEMBER DECLARATION

I declare that I am the member of the IVCM Heritage SIPP and that the changes requested above are to be effected throughout my plan accordingly. I hold the Trustee free of any liability in changing the above. Where I have notified you of a change of nominated beneficiary, I request that the Trustee pay my nominated beneficiaries their discretionary payment of benefits in the event of my death.

Member Signature

Date [dd/mm/yy]

When complete
email or post this form:
ivcm@heritagepensions.co.uk

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The IVCM Heritage SIPP is operated and administered by Heritage Pensions Limited who are authorised and regulated by the Financial Conduct Authority. The asset trustees for the IVCM Heritage SIPP is Heritage Trustees Limited. An agreement is in place between Heritage Pensions Limited and IVCM whereby certain administrative functions in respect of the IVCM Heritage SIPP are outsourced to and undertaken by IVCM.