

# Notification of Bereavement form (Pensions)

## Notes for completion:

Please complete all sections of the enclosed Notification form.

If solicitors or a personal representative are dealing with the estate or acting on your behalf, they may complete the form on your behalf. If someone else is dealing with the estate on your behalf, such as a close friend or Solicitor, please ensure that their details are included on the form.

We need all the relevant fields on this form to be completed. We will return the form for completion if any vital information is missing.

Please refer to our Bereavement Support guide if you require assistance with any of the questions we have asked.

Please complete the form in BLOCK CAPITALS. Do not use correction fluid if you make a mistake. If you need to correct a mistake, please initial any changes you make.

Your completed form and supporting documentation can be returned to us either via post  
**Scottish Friendly Asset Managers Limited, Galbraith House, 16 Blythswood Square, Glasgow G2 4HJ**  
or via email sent to the following email address: [pensionclaims@scottishfriendly.co.uk](mailto:pensionclaims@scottishfriendly.co.uk)

Once we have received your form and supporting documentation, we will assess the claim, however we may have to ask for additional information where it is felt necessary.

## Section 1. About the Deceased

First Name:

Surname:

Former Surname (if any):

National Insurance Number:

Date of Birth:

Date of Death:

Personal status at date of death  
(e.g. married, civil partner, single):

Policy Number(s):

You can find this on any of their policy or plan documentation. If there's more than one policy, just enter one of them below. It doesn't matter which one, as this form will help us find any other policies they might have with us. Don't worry if you don't have a policy number. You can still complete the form.

Did the deceased have any dependents:            No            Yes

(if Yes please provide full details of all dependent's below. Our Bereavement support guide has a section covering who dependent's are):

1st Dependent's Name:

1st Dependent's Date of Birth:

1st Dependent's Relationship  
to the Deceased:

2nd Dependent's Name:  
(if applicable):

2nd Dependent's Date of Birth:

2nd Dependent's Relationship  
to the Deceased:

3rd Dependent's Name:  
(if applicable):

3rd Dependent's Date of Birth:

3rd Dependent's Relationship  
to the Deceased:

4th Dependent's Name:  
(if applicable):

4th Dependent's Date of Birth:

4th Dependent's Relationship  
to the Deceased:

## **Section 1. About the Deceased (Continued)**

If the Deceased had more dependent's, please provide details below  
and continue on a separate sheet if required:

## Section 2. Your Details

Your Title:

Your Name:

Your Address:

Post Code:

Your Telephone Number:

Your Email Address:

Please state your preferred method of communication by ticking the relevant box:

I want communication by e-mail

I want communication by post

Your Relationship to the Deceased:

Is someone else dealing with the estate, or acting on your behalf:

No

Yes

(if Yes please provide their details below)

Contact Name:

Contact Address:

Post Code:

Contact Telephone Number:

Contact Email Address:

Did the deceased hold a will?

No

Yes

Are you or someone else applying for Grant of Probate/Confirmation?

No

Yes

(Our Bereavement Support Guide has a section covering what these documents are)

### Section 3. Documentary Evidence

Please supply all documentation that you have available, but don't delay sending us this form.

Once you get any remaining documentation send us these.

We may not be able to settle your claim until we receive everything, but we will let you know what we need

Please indicate enclosed documents by ticking the relevant box:

<p>A valid copy of the Death Certificate Required in all cases</p>	No	Yes
<p>Coroner's Interim Death Certificate (certified copy or original) Required in all cases</p>	No	Yes
<p>Grant of probate/Certificate of Confirmation: Required in all cases if the claim value is £25,000.00 or more, or if the spouse claim value is £100,000.00 or more.</p>	No	Yes
<p>Marriage certificate (certified copy or original) Where the deceased member has surviving spouse at the time of death</p>	No	Yes
<p>Decree absolute (certified copy or original) Where the deceased member was divorced when they died</p>	No	Yes
<p>Civil registration certificate (certified copy or original) Where the deceased member had a registered civil partnership when they died</p>	No	Yes
<p>Proof of financial interdependency (Not required where there is a Marriage or Civil Partnership Certificate) Where the deceased member had a nominated partner; examples of proof of financial interdependency are joint bank accounts, utility bill or a joint mortgage)</p>	No	Yes
<p>Children's birth certificates (showing full details of parents) Where the deceased member had any eligible children</p>	No	Yes

Adoption certificate (signed certified copy or original) Where eligible children were adopted	No	Yes
Certificate of continuing education Where eligible children are over 17 years old, under 23 and are in continuous full-time education or training	No	Yes
Certified Power of Attorney or Court of Protection order (Full document) Where the person signing is not legally entitled to receive family benefits and is signing on behalf of the spouse or civil partner.	No	Yes
Proof of guardianship / Residency order Where the person signing is responsible for the care of any eligible children.	No	Yes
Declaration of Trust Deed Where the policy was written under trust and there are appointed Trustees	No	Yes
Expression of Wish form/letter	No	Yes
A copy of the Will	No	Yes
Original Policy Document	No	Yes

From 6 April 2024, HM Revenue & Customs require us to test the claim value against the deceased's lump sum and death benefit allowance (LSDBA) which is currently set at £1,073,100.00

In this section, you will be asked about previous Lump Sums that may have been paid from other policies held by either the deceased or yourself that you are entitled to. This is to allow us to calculate what will become the "previously used amount" of the deceased's applicable allowances. If you are unsure how much LTA you have used, you can contact your other pension providers who will be able to provide you with this information.

Please select **only one** statement from the below by ticking the relevant box;

**Statement 1** - I confirm I have used 100% of my Lifetime Allowance (LTA) with other schemes prior to 6 April 2024 or have used my LSDBA(Lump Sum Death Benefit Allowance) on policies held by the deceased after 6 April 2024. Ticking this box is confirmation that my LSA(Lump Sum Allowance)/ LSDBA(Lump Sum Death Benefit Allowance) will be nil.

**Statement 2** - I confirm that I have yet to receive any Pension Benefits from other policies that I or the deceased held. Ticking this box is confirmation that the deceased's LSA/LSDBA are yet to be used and will be set to the maximum value available.

**Statement 3** - I confirm that I have received Pension Benefits from other schemes before 6 April 2024, using up some but not all of my Lifetime Allowance (LTA).

**Please tell us the % of the LTA you have used.**

"I can confirm I have used            % of my Lifetime Allowance"

**Statement 4** - I confirm that I have received Pension Benefits from other policies that the deceased held. However, this did not use 100% of the deceased's LTA prior to 6 April 2024. **Note:** If you tick this box you must also complete the table below.

If you ticked Statement 4 above, we require you to provide us a breakdown of all relevant lump sums you have received to date from all policies held by the deceased, including the amounts associated with each. "Relevant lump sums" relates to the following;

- Pension Commencement Lump Sums
- The tax-free elements of any uncrystallised funds pension lump sum
- Uncrystallised funds lump sum death benefits
- Drawdown pension lump sum death benefits & flexi-access drawdown lump sum death benefits from benefits crystallised on or after 6 April 2024.
- Serious ill-health lump sums
- Defined benefits lump sum death benefits
- Pension protection lump sum death benefits
- Annuity protection lump sum death benefits

You are not required to inform us of any of the following:

- Small Lump Sum Payments (<£10,000)
- Winding up lump sums
- Trivial Commutation lump sum
- Charity lump sum death benefit
- Trivial Commutation lump sum death benefit

Please use the below table to tell us about when you received previous benefits from the deceased’s policies:

Type of Benefit Recieved	When you received this Benefit	Total Amount (£)

**Please continue on a separate sheet if necessary.**

Did the deceased have any form of Protection from HM Revenue & Customs (e.g., Primary or Fixed Protection certificate). If the answer is Yes, please provide a copy of the certificate.

Yes

No

Your Name:

Your Signature:

Date:

**Please note that we are unable to accept either Docu-signed or typed signatures. All signatures must be signed in ink.**