

Pension Portfolio Benefit Direction Form



– direction to not pay death benefits
as a lump sum

You must only complete this form if:

- you've previously made your Pension Portfolio subject to the Aviva Pension Portfolio Trust, and
- you now no longer wish us to pay your death benefits as a lump sum.

Please tick the appropriate box in the declaration below to tell us how you would like us to pay any death benefit that may become payable from your Pension Portfolio.

Your details – Please complete in all cases

First name(s)

Surname

Your Pension Portfolio account number

and any related account which originates from the Pension Portfolio number shown above.

Declaration

I confirm that I would like you to pay any death benefits that may become payable from my Pension Portfolio as follows.

You can choose either Flexi-Access Drawdown or Annuity. Please tick the appropriate box below to tell us how you would like us to pay any benefits.

Flexi-Access Drawdown

If you select flexi-access drawdown this means we'll offer any death benefit to your beneficiaries as flexi-access drawdown. Separately, you can use the 'Pension Portfolio - death benefit expression of wishes' form to tell us who you would like the payments to go to. Although we'll take your wishes into account, we'll not regard it as binding on us and will use our discretion.

Annuity

If you select annuity this means we'll offer any death benefit as an annuity for your beneficiaries. Separately, you can use the 'Pension Portfolio - death benefit expression of wishes' form to tell us who you would like the payments to go to. Although we'll take your wishes into account, we'll not regard it as binding on us and will use our discretion.

I can cancel or change this request at any time. This replaces any previous request I've made about how I would like you to pay my death benefits.

Print name

Signature

Date

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