

Notes

This form deals only with a Dependant's Pension should a Member die and not leave a Spouse or Civil Partner. There is a different form to be completed by Members who wish to make nominations in respect of Lump Sum Death Benefits.

The nomination form should not be completed by any married Member, unless they are living apart from their Spouse or Civil Partner. Any such Member wishing to nominate some other person to receive a Dependant's Pension should write to the Secretary to the Trustee. The Trustee has discretion to accept that the spouse is not a pensionable spouse and their decision will be notified to the Member.

Under the Rules of The Metal Box Pension Scheme, the payment of Dependant's Pensions to persons other than the Member's Spouse or Civil Partner is at the discretion of the Scheme's Trustee.

A Dependant's Pension may be payable to a person who, at the date of death, was, in the opinion of the Trustee, wholly or mainly financially dependent on the deceased Member. A Pensionable Dependant is likely to be one of the following:-

- an aged or infirm relative;
- a child over age 18 who is permanently incapacitated by reason of injury or illness;
- a person who had generally been regarded as being married to, or in a state of Civil Partnership with, the Member (but was not legally married to, or in a legal Civil Partnership with, the Member).

In exercising its discretion, the Trustee will consider as many of the relevant circumstances of each application as it deems, in its absolute discretion, to be appropriate, including but not limited to:-

- the existence or not of a Spouse or Civil Partner;
- the degree of the applicant's financial dependency on the Member;
- the nature and duration of the relationship between the applicant and the Member;
- the ability of the applicant to earn his / her own living;
- the extent to which the disposition of his / her estate demonstrates the Member's relationship with, or responsibility to, the applicant; and
- any other sources of income available to the applicant, including any post-death provisions made by the Member in favour of the applicant.

It is emphasised that these notes do not in any way inhibit or direct the Trustee's discretionary powers under the Rules. The Trustee will continue to exercise its discretion on the merits of each case and will use these guidelines only as an aid to achieving a consistent and equitable approach in the consideration of all applications for Pensionable Dependency.

Members are reminded that, if their circumstances change at a later date, it is important that they complete further nomination forms, which will supersede those previously completed. Blank nomination forms can be downloaded from the pension scheme website: metalboxpensions.co.uk and are also available from:-

The Metal Box Pension Scheme
c/o Equiniti
Sutherland House
Russell Way
Crawley
West Sussex RH10 1UH

**THIS NOMINATION FORM WILL BE REVOKED BY THE MEMBER'S SUBSEQUENT MARRIAGE,
CIVIL PARTNERSHIP, OR BY A NOMINATION BEARING A LATER DATE**