

Nortel Networks UK Pension Plan

Please use this form to tell us about a change in your status or circumstances if your membership of the Plan arises from a period of employment with Nortel Networks UK (NNUK) or companies subsequently acquired by NNUK.

If you are in receipt of a pension from the Plan as a result of the death of a former NNUK employee then this form is not relevant so please address your query to our admin team using the contact details on our website homepage.

Please complete the 'Dependants' section even if you are currently married or in a civil partnership since your situation may change in the future. This information is relevant if we secure benefits for members outside of the Pension Protection Fund.

Your Full Name: _____ National Insurance Number: _____

Address: _____

Postcode: _____

Please remember to sign and date this form at the end of Section 3 and then send both pages to the following address:

Nortel Networks UK Pension Plan, c/o Willis Towers Watson Limited, PO Box 545, Redhill, RH1 1YX

Beneficiary Form

Section 1. Current Marital Status

Please update the Plan's records as follows:

- I am Married or in a Civil Partnership. The details of my spouse/civil partner are:

Full Name: _____

Date of Birth (DD/MM/YYYY): _____ Male Female

Same address as me, or if different:

Address: _____

Postcode: _____

If you do not live with your spouse/civil partner, are they financially dependent on you?

Yes No

- I am **not** Married or in a Civil Partnership

If this applies to you, please tick the box which best describes your current situation

I have a Partner I am Divorced I am Widowed I am Single

Please now complete Section 2.

Section 2. Dependants

*If, when you die, you do not have a spouse/civil partner who you live with or who is financially dependent on you, then the Plan **may** pay a pension to someone else who is financially dependent upon you.*

*Please **do not** include children or stepchildren aged under 18 (or 23 if in full-time education or vocational training) since they would be paid a separate allowance.*

Please update the Plan's records as follows:

I have _____ dependants (insert number, ie 0,1,2,3...etc). *If you wish to list more than 4 dependants then please use and sign a separate sheet of paper or copy the next page.*

*If you have ticked 'I have a Partner' above then please give their details first on the **next page**.*

Full Name: _____
 Same address as me, or if different:
 Address: _____
 _____ Postcode: _____
 Date of Birth (DD/MM/YYYY): _____ Male Female
 Relationship to me: Partner Parent Adult child/stepchild Other
 If Other, please specify: _____

Full Name: _____
 Same address as me, or if different:
 Address: _____
 _____ Postcode: _____
 Date of Birth (DD/MM/YYYY): _____ Male Female
 Relationship to me: Parent Adult child/stepchild Other
 If Other, please specify: _____

Full Name: _____
 Same address as me, or if different:
 Address: _____
 _____ Postcode: _____
 Date of Birth (DD/MM/YYYY): _____ Male Female
 Relationship to me: Parent Adult child/stepchild Other
 If Other, please specify: _____

Full Name: _____
 Same address as me, or if different:
 Address: _____
 _____ Postcode: _____
 Date of Birth (DD/MM/YYYY): _____ Male Female
 Relationship to me: Parent Adult child/stepchild Other
 If Other, please specify: _____

If you have listed more than one dependant above and wish to nominate only one of your dependants to receive a pension please tick this box and we will contact you

Please now complete Section 3.

Section 3.

I agree to give such further information as may be required by the Trustee of the Nortel Networks UK Pension Plan in support of the above details and I appreciate that my circumstances and those of my Dependants will be subject to verification at the time of my death. I note that any benefit is subject to the rules of the Plan as apply from time to time, including any trustee discretion and applicable law.

I understand that I may update the information given above at any time if my circumstances change. I also understand that the Trustee may share some of my information with their advisors, external insurers and reinsurers. I agree that such information may include my personal data for the purposes of the Data Protection Act 1998 held by the Plan, and that the sharing of such data will only be done in accordance with the Data Protection Act.

Signed: _____ Print Full Name: _____ Date: _____

Beneficiary Form – Frequently Asked Questions

Q1. Some of my friends received a 'Beneficiary Form' with the last member letter but I did not – can you explain why this is ?

The fundamental purpose of the form is to help us understand whom we might have to pay a pension to when a former NNUK employee dies. Hence the most likely explanation is that you are already receiving a pension from the Plan as a result of the death of a former employee. If this is the case, then the Plan has no liability to pay a pension to anybody upon your death.

The form was therefore sent to all members who were previously employed by NNUK or certain other companies that were subsequently [acquired](#) by NNUK. The exception to this is members whose pension entitlement arises **only** from the 'Q' or 'EPB' schemes (see [Main FAQ, Q4-1](#) for more details). This is because neither of these schemes includes an obligation to pay benefits to anyone when the member dies.

If you are still unsure about your status then please contact us for further clarification – it may just be that we don't hold a record of your current address.

Q2. I received a 'Beneficiary Form' with the last member letter but am not quite sure who might be considered to be a 'dependant' and whether they should be entered in Section 1 or Section 2 or indeed both Sections.

If you have a spouse or civil partner then you should include their details in Section 1 only.

We recognise that there are circumstances when your spouse/civil partner may not live with you (e.g. they are resident in a care or nursing home) but are still dependent on you financially so if this is the case please provide their address and tick the 'Yes' box.

If you are separated or living apart from your legal spouse/civil partner and do not consider them to be financially dependent on you then tick the 'No' box. If this means that you wish to nominate another person as your partner in respect of your NNUK pension then please list their details first in Section 2 and tick the 'Partner' box.

If you do not have (or are divorced from) a spouse/civil partner but do have a partner then you should enter their details first in Section 2

If, at the time of your death, you do not have a living spouse, civil partner or partner then upon receipt of the necessary supporting evidence the Trustee has the discretion to pay a pension to another person who, in its opinion, is wholly or mainly dependent on you for the ordinary necessities of life. By way of example, this might be a disabled son or daughter over the age of 23. If this scenario might be relevant to your family circumstances then you should enter details of the relevant person(s) in Section 2.

The total number of entries in Section 2 should be entered in the box at the beginning of Section 2

Q3. I received a 'Beneficiary Form' with the last member letter and don't understand why I don't have to enter children who are still in full-time education ?

Children or stepchildren who are under the age of 18 (or under the age of 23 and still in full time education) could receive an allowance from the Plan which would be additional to a pension paid to a spouse, civil partner or partner. The Trustee will investigate if this is relevant to your circumstances at the time of your death.

Q4. I am divorced and do not have a partner or any other dependants. Should I still complete the form ?

Yes – tick the 'I am not Married or in a Civil Partnership' box in Section 1 and also tick the most appropriate box underneath this statement. Enter '0' for the number of dependants at the beginning of Section 2 and leave the rest of that Section blank.

Q5. If my spouse dies before me then what happens to the pension he/she would have been entitled to ?

If your spouse, civil partner or partner dies before you their pension entitlement will cease. You should complete a new 'Beneficiary Form' to reflect any subsequent change in your relationship status or dependants.