

Pension and Assurance Scheme for Lay Employees of the **Methodist Church**



INTRODUCTION

The purpose of this Booklet is to explain in a straightforward way the main benefits which are provided from the Pension & Assurance Scheme for Lay Employees of the Methodist Church (“the Scheme”). While the Booklet explains the main features of the Scheme, it must be pointed out that it does not take the place of the formal Trust Deed and Rules of the Scheme. In the event of any conflict between the Booklet and the Trust Deed and Rules, the latter will prevail.

This version of the booklet (dated October 2020) sets out the provisions of the Scheme at the date of publication. It will be updated from time to time if these provisions are amended. Thus, if you are reading the booklet at a later date, you should check that the provisions are still current.

Following the Closure of the Scheme on 31 May 2019, this booklet is primarily addressed to Closure Members who are still employed by Scheme Employers, but it also sets out the benefits of those who leave employment.

The Scheme is administered by a Corporate Trustee – The Methodist Lay Employees’ Pension Trust Limited. Some of the Directors are elected by the members of the Scheme and some are appointed by the Methodist Council.

The assets of the Scheme are kept separate from Methodist Church funds and are invested on the advice of professional advisers and investment managers. The Trustee invests its assets responsibly and considers Environmental, Social and Governance factors. Further details can be found in the Trustee’s Responsible Investment Policy and in the Scheme’s Statement of Investment Principles. Accounts are audited annually and an actuarial valuation is made every three years to ensure that the Scheme is able to pay the benefits described.

The Scheme is a registered pension scheme, registered in accordance with Section 153 of the Finance Act 2004.

The Scheme is not contracted out of the State Pension Scheme.

Further details about the Scheme and about members’ entitlements are available from:

The Methodist Church
The Pensions Manager
Methodist Church House
25 Tavistock Place
London WC1H 9SF
Tel: 020 7486 5502

Email: pensionshelp@methodistchurch.org.uk

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EXAMPLES

1. MAIN BENEFITS

The Pension and Assurance Scheme for Lay Employees of the Methodist Church provides:

Death Benefit

should you die as a Member of the Scheme.

Retirement Pension

at your Normal Pension Date, with the opportunity to retire from age 55.

Tax Free Cash Sum

at the time of your retirement in exchange for part of your pension.

Spouse's/Civil Partner's Pension and Children's Pension

a Civil Partner's pension is now available as well as Spouse's and Children's Pensions.

Examples of benefits are included at the back of this Booklet.

2. TERMS USED IN THIS BOOKLET

There are several terms with special meanings used throughout the booklet. The main terms are set out below:

Scheme Pension and Assurance Scheme for Lay Employees of the Methodist Church.

Basic Single retirement Pension basic flat rate retirement pension for a single person under the State's benefit scheme.

Pensionable Earnings are your basic annual earnings on 1 September in each year, less an amount equal to 75% of the Basic Single Retirement Pension at that date.

Final Pensionable Earnings is the Pensionable Earnings on 1 September before the date Scheme contributions ceased to be deducted.

Basic Earnings¹ are your basic annual earnings on 1 September in each year prior to the earlier of your retirement, death, or reaching 75.

Normal Pension Date is the date of attaining male State Pension Age. However, for service earned prior to 1 September 2015, the Normal Pension Date is the date that you attain age 65.

Pensionable Service means the number of years and days you paid pension contributions to the Scheme prior to the Closure of the Scheme.

Member means a person who has an entitlement to benefits in the Scheme prior to the closure of the Scheme.

Employers mean the Methodist Council or an associated employer which is participating in the Scheme.

Employment is employment by the Methodist Council or an associated employer which is participating in the Scheme.

State Pension Age the earliest age you can claim your State Pension.

Spouse a person's lawfully married partner, or Civil Partner.

Civil Partner a person who enters into a legally recognised Civil Partnership

Closure Member is a Member whose Pensionable Service ceased on 31 May 2019 and who remains employed by an Employer.

Closure Date is 31 May 2019.

3. ELIGIBILITY

The Scheme closed to future accrual of Pensionable Service on 31 May 2019. No new employees are eligible to join the Scheme from 1 June 2019 onwards.

4. CONTRIBUTIONS

From 1 June 2019 no new contributions are accepted in to the Scheme.

If you were an actively contributing member of the Scheme before it closed to future accrual of Pensionable Service on 31 May 2019, pension contributions would have been paid as advised by the Scheme Actuary.

Employer contributions are paid in accordance with the Schedule of Contributions.

5. RETIREMENT BENEFITS

5.1 How is my pension calculated at my Normal Pension Date?

Your pension will be calculated as follows:

$$\frac{1}{60} \times \text{Final Pensionable Earnings} \times \text{Years and days of Pensionable Service to 31 August 2006}$$

plus

$$\frac{1}{70} \times \text{Final Pensionable Earnings} \times \text{Years and days of Pensionable Service on or after 1 September 2006 to date Pensionable Service ceased}$$

As a Closure Member you would have been issued a Closure Statement which detailed the benefits to which you are entitled.

If your contributions ceased on the Closure Date, your pension will be calculated on the basis of the greater of:

- your years and days of Pensionable Service up to the Closure Date and your Final Pensionable Earnings as at the day you cease Employment; and
- your years and days of Pensionable Service up to the Closure Date and your Final Pensionable Earnings as at the Closure Date, revalued in the same way as the deferred benefits described in Section 10.

NB. Once you leave employment the deferred pension will be recalculated and consequently, you will no longer be entitled to the underpin.

5.2 Pension Increases

Pensions are increased annually on 1 September in line with the increase in the UK Index of Retail Prices (RPI) as at the previous July.

For Members who joined the Scheme before 2 December 1997, pensions earned in respect of Pensionable Service to 31 August 1998, the increase is a fixed 5% pa. Increases on Pensionable Service from 1 September 1998 to 6 April 2005 increase in line with the lower of the Retail Price Index (RPI) and 5% pa. Pension earned from 6 April 2005 onwards will increase in line with increase in the RPI up to a maximum of 2.5% pa.

5.3 Surrender of Pension

Before you retire, you can elect in writing, with the consent of the Trustee, to give up part of your pension in order to provide an additional pension for your Spouse, Civil Partner or a pension for one or more named dependants.

This pension would be payable for the remainder of their lifetime commencing from the date of your death. If your Spouse, Civil Partner or your named dependant should die before you, the reduction in your pension will continue to take effect.

If you are interested in this option you should apply to the Pensions Office before your retirement for full details.

5.4 How will my pension be affected if I retire after my Normal Pension Date?

Pension in respect of Pensionable Service prior to 1 September 2015 is based on Final Pensionable Earnings at age 65 (or earlier leaving service) and will be enhanced by a late retirement factor if you retire after age 65. Pension earned from 1 September 2015 will be enhanced by a late retirement factor if you retire after State Pension Age.

Once you retire, your pension will be payable monthly in advance and will be taxed as “earned income”.

Your pension for any period of part-time service will be adjusted to take account of your reduced hours whilst working part-time. Please contact the Pensions Office if you would like further information on how working part-time affects the calculation of your pension.

5.5 May I exchange part of my pension for a cash sum?

At retirement you may elect, in writing to the Trustee, to exchange part of your pension for an immediate tax-free cash sum.

The maximum cash sum will generally be the value of 25% of your pension. In some situations you may be able to commute more than 25% of your pension for a tax-free lump sum. You will be given full details when you retire.

The actual amount of cash sum payable in place of each £1 per annum of pension given up will be determined by the Trustee at the time of your retirement on the advice of the Scheme’s actuary.

6. EARLY RETIREMENT

You may retire with the consent of the Trustee at any time after attaining the age of 55 or at any time if retirement is due to permanent incapacity. Your pension will be based on completed Pensionable Service and Final Pensionable Earnings at the date Pensionable Service ceased. It will then be reduced to take account of the extra cost of earlier payment. The rate of reduction will be determined by the Trustee prior to retirement, unless you are retiring for ill-health reasons as a Closure Member, in which case no reduction will apply. Further information is available from the Pensions Office.

However, pension in respect of service prior to 1 September 2015 is calculated based on Final Pensionable Earnings at age 65 (or date Pensionable Service ceased, if earlier). If you retire at age 65 an early retirement reduction will not be applied to this element of pension. If you retire after age 65, this element of pension will be enhanced by a late retirement factor.

Ill health pensions are subject to review from time to time once in payment and the Trustee may reduce, suspend or terminate an ill health pension if it concludes that the recipient no longer qualifies. Applications to retire on health grounds should be sent to the Pensions Office.

7. LATE RETIREMENT

If you draw your pension after your Normal Pension Date, your pension will be calculated as detailed under Retirement Benefits.

Pension earned in respect of service prior to 1 September 2015 has a Normal Pension Date of 65 and will be increased from the Closure Date (or earlier date of ceasing Pensionable Service) in line with statutory revaluation up to age 65, and subsequently enhanced with a late retirement factor. Pension earned in respect of service after 1 September 2015 will be increased in line with statutory revaluation up to your Normal Pension Date, and further enhanced by a late retirement factor if retirement takes place after male State Pension Age.

You may choose to defer receiving your pension to any date after your Normal Pension Date, but no later than age 75.

8. DEATH BENEFITS *BEFORE* RETIREMENT

If you should die whilst in Employment and before your Normal Pension Date, the following benefits would be payable.

Lump Sum

If you die before you retire, a lump sum equal to the value of the contributions you have made to the Scheme will become payable.

The Trustee has discretion as to whom any death benefit lump sum will be paid. You are advised to complete a Nomination Form (enclosed with this Booklet), to assist the Trustee in determining to whom any death benefit should be paid. Your wishes will be taken into consideration but the Trustee will not be bound to act in accordance with them.

Spouse's or Civil Partner's Pension

If you die whilst you are an Employee, your Spouse or Civil Partner will receive a pension equal to 25% of your Basic Earnings at the time of your death.

9. DEATH BENEFITS AFTER RETIREMENT

Once you retire, your pension will be paid for the rest of your life. On death after retirement the following benefits are payable.

Lump Sum

If you die within five years of the commencement of your pension, before age 75, a lump sum will be paid equal to the unpaid balance of five years' pension payments at the rate in force at the date of death.

The Trustee has discretion as to whom this lump sum benefit will be paid. You are advised to complete a Nomination Form (enclosed with this Booklet). This will assist the Trustee in determining to whom any death benefit should be paid.

Spouse's or Civil Partner's Pension

If you are married or have a Civil Partner, a pension is payable to your Spouse or Civil Partner equal to one half of the pension you were receiving at the date of your death or would have been receiving ignoring any reduction made because you took a tax free cash sum or gave up part of your pension to provide additional pension for your Spouse, Civil Partner or any dependants at retirement.

If your Spouse or Civil Partner is more than 10 years younger than you, the amount of the pension may be reduced.

If you marry or form a civil partnership after retiring and die within six months of your marriage or formation of civil partnership, the Trustee has discretion as to whether the Spouse's or Civil Partner's pension will be paid or reduced.

Dependent Children's Pensions

If you leave a child or children under the age of 18 (or 23 if still receiving full-time education) a child's pension will be paid equal to 25% of the Spouse's pension for each child up to a maximum of 4 children; until they reach age 18 (or 23 if still receiving full-time education).

Dependant's Pension

If you are not survived by a Spouse or Civil Partner, the Trustee has discretion to pay a pension, which would not exceed in total the Spouse's pension otherwise payable, to one or more of your dependants.

Pension Increases

A Spouse's pension or a Civil Partner's pension or child's pension or a dependant's pension would be increased in a similar way to the Member's pension, as described earlier in this Booklet.

10. LEAVING EMPLOYMENT

The Scheme closed to future accrual of Pensionable Service on 31 May 2019.

Deferred Pension

If you have two or more years of Pensionable Service you will be entitled to a deferred pension payable from your Normal Pension Date based on your Final Pensionable Earnings and the period of Pensionable Service at the date you left.

Your deferred pension will increase over the period from the date your Pensionable Service ended to your Normal Pension Date. The pension that you built up in the Scheme to 5 April 2009 will increase at the rate of 5% per annum or the increase in the UK Index of Consumer Prices over this period, if this is lower. Pension in respect of Pensionable Service from 6 April 2009 will increase at the rate of 2.5% per annum or the increase in the UK Index of Consumer Prices, if lower.

If you left the Scheme with an entitlement to deferred benefits and have attained the age of 55 or at any age if the Trustee agrees (after obtaining medical advice) that you are permanently incapacitated, you may request that your deferred pension commences before Normal Pension Date. Such pension will be subject to reduction to take account of the pension being paid early.

Pension in respect of service prior to 1 September 2015 will be based on Final Pensionable Earnings on leaving service or age 65 if earlier. This element of pension will be revalued in line with the UK Index of Consumer Prices (subject to the 2.5%/5% pa cap as appropriate) to age 65, and enhanced by a late retirement factor if retirement occurs after age 65.

If you die before your deferred pension has started to be paid, a lump sum will be payable to your dependants or estate equal to your own contributions to the Scheme (see section 8). If you die after the deferred pension has started to be paid, the benefits described in section 9 will be paid.

Transfer to another scheme

As an alternative to keeping your deferred pension in the Scheme you may transfer the value of your benefits to another registered occupational pension scheme, if it is willing and able to accept the transfer, or to a personal arrangement.

The transfer value represents the current value of your deferred benefits and is calculated on the advice of the Scheme Actuary. The value of your benefits and the increases to these benefits are included in the transfer value. The amount of your transfer value will depend on market conditions and so may go up or down over time.

If you want to investigate the possibility of transferring your benefits, please apply to the Pensions Office for a quotation of your current transfer value. The quotation will be guaranteed for three months. If more than 3 months have passed a new transfer value will need to be calculated and this may be higher or lower than the first quotation. You are entitled to request a quotation of your current transfer value once every 12 months.

It is advisable to seek independent financial advice as to whether or not transferring your deferred pension to another arrangement would be in your best interests. If your transfer value is greater than £30,000 you are required by legislation to obtain independent advice from a Financial Conduct Authority (FCA) authorised adviser before you can transfer your benefits from the Scheme.

11. OTHER INFORMATION

11.1 Annual Reporting

Each year the Trustee produces an Annual Report on the Scheme. The Report contains audited accounts, a statement from the Scheme Actuary, a review of the year from the Investment Manager and some other items of information. Copies of the report are available here: www.methodistchurch.org.uk

An annual funding statement giving up-to-date funding information is also produced and issued to members.

11.2 The Pension Tracing Service

The Scheme has been registered with The Pension Tracing Service and information includes an address where the Trustee may be contacted. The purpose for which the information has been registered is to help individuals who have lost touch with their previous pension scheme to trace their rights. Extracts from the register relating to a particular scheme are available to persons entitled to that scheme's benefits on written request to:

Pension Tracing Service
Debt Centre Washington
Bulk Letter Forwarding Service
Mail Handling Site A
Wolverhampton
WV98 2DU

Telephone: 0800 731 0193
www.gov.uk/find-pension-contact-details

11.3 Disputes

Complaints about the Scheme are generally resolved informally. However, if you are not happy with the result of the informal process, there is a formal procedure for resolving complaints with the Trustee of the Scheme. Details are available from the Secretary to the Trustee at the address given in the Introduction to this booklet.

11.4 TPAS (The Pensions Advisory Service)

The Money Advice Service (MAS), Pension Wise and the Pensions Advisory Service (TPAS) all fall under the services provided by the Single Financial Guidance Body.

Services provided include free pensions guidance relating to workplace and personal pensions. TPAS continues to assist pension scheme members and beneficiaries of pension schemes in connection with difficulties which they have failed to resolve with the trustees or administrators of a scheme. Pension Wise provides a free government service which helps individuals understand their options when making decisions about their personal money pots.

Contact details are:

Pension Wise: 0800 138 3944

TPAS : 0800 011 3797

MAS : 0800 138 777

<https://singlefinancialguidancebody.org.uk/>

11.5 The Pensions Ombudsman

For disputes that cannot be settled with the assistance of TPAS, a Pensions Ombudsman has been established with powers of investigation similar to those of a county court.

The Pensions Ombudsman has the power to investigate and determine any complaint or dispute of fact or law concerning occupational and personal pension schemes. A complainant may appeal to the Pensions Ombudsman if he or she believes that they have been unfairly treated by the trustees or managers of an occupational or personal pension scheme. The Pensions Ombudsman can be contacted by writing to:

The Pensions Ombudsman
11 Belgrave Road
London
SW1V 1RB

Website: www.pensions-ombudsman.org.uk

11.6 The Pensions Regulator

The Pensions Regulator has been established to monitor the running of occupational pension schemes. The Regulator is able to intervene in the running of schemes where trustees, employers or professional advisers have failed in their duties. The Pensions Regulator can be contacted at:

Napier House
Trafalgar Place
Brighton
BN1 4DW

Website: www.thepensionsregulator.gov.uk

11.7 Data Protection

The Trustee is a “controller” for the purposes of the data protection laws. Data protection laws changed in 2018 and overriding legislation came into effect on 25 May 2018 – General Data Protection Regulations (GDPR). GDPR regulates how the Trustee holds and processes your personal information. The Trustee has a GDPR policy a copy of which may be obtained by contacting the Pensions Office.

Example 1: Retirement at Pre 2015 Normal Pension Date

(age 65 on 31 May 2025)

Pension

A male Member joined the Scheme on 1 June 2000 and retires at his Normal Pension Date on 31 May 2025 at age 65. His Final Pensionable Earnings at 31 May 2019 are £23,500 per annum. At 1 September 2024, Pensionable Earnings of £25,000 per annum is greater than the increase in deferment between Closure Date and retirement.

The Member has 6 years and 92 days' service (ie 6.25 years) prior to 1 September 2006, 9 years service from 1 September 2006 to 31 August 2015 and 3 years 273 days (3.75 years) from 1 September 2015 to Scheme closure on 31 May 2019.

The Member's pension entitlement is:

Pre 2006 Pension	=	£25,000	x	$\frac{6.25}{60}$	=	£2,604.16	per annum
2006 to 2015 Pension	=	£25,000	x	$\frac{9}{70}$	=	£3214.29	per annum
Post 2015 Pension	=	£25,000	x	$\frac{3.75}{70}$	=	£1,339.28	per annum

The post 2015 pension has a Normal retiring Date of 31 May 2027 (Age 67) and therefore is reduced by an actuarial factor because the pension is commencing two years earlier, at age 65. For the purposes of this example the reduction to the post 2015 pension will total 11.2% (ie the post 2015 pension will be reduced to 88.8% of its full value). This factor will change over time.

Post 2015 Reduced Pension	=	£1,339.28	x	88.8%	=	£1,189.28	per annum
Total Pension	=	£2,604.16	+	£3,214.29	+	£1,189.28	£7,007.73 per annum

The Member chooses to exchange 25% of the pension for a cash sum. The amount of pension given up would be:

$$0.25 \times £7,007.73 = £1,751.93 \text{ per annum}$$

Leaving a pension of

$$£7,007.73 - £1,751.93 = £5,255.80 \text{ per annum}$$

The Member would receive a cash sum in respect of the pension given up of:

$$£1,751.93 \times 14.08^1 = £24,667.17$$

¹ This is the current male actuarial factor at age 65 which is subject to review from time to time. The current factor for a female member at age 65 is 14.43.

This residual pension of £5,255.80 per annum will be the amount on which all future increases in pension will be calculated. The contingent Spouse's pension entitlement will be based on the Member's pension entitlement calculated before any exchange of pension for a lump sum, increased in line with pension increases granted to the date of death, ie one half of £7,007.73 plus increases in this example.

Example 2: Retirement at Post 2015 Normal Pension Date

(age 67 on 31 March 2028)

Pension

A male Member joined on 1 June 2008 and retires at his Normal Pension Date of 31 June 2028 at age 67. He has 11 years of Pensionable Service to the Scheme Closure date of 31 May 2019. His Final Pensionable Earnings at age 65 were £25,000 per annum and his Final Pensionable Earnings at age 67 are £26,000 per annum, which is greater after the application of inflationary increase once applied to the Pensionable Earnings at Closure Date.

Pension in respect of service prior to 1 September 2015 is calculated based on *Final Pensionable Earnings* at age 65 and is enhanced by a late retirement factor because retirement is after age 65.

Service pre 1/9/2015	:	7 years 92 days	=	7.25 years
Service post 1/9/2015	:	3 years 273 days	=	3.75 years

Calculation of pension before application of late retirement factor is:

Pre 2015 Pension	=	£25,000	x	$\frac{7.25}{70}$	=	£2,589.28 per annum
Post 2015 Pension	=	£26,000	x	$\frac{3.75}{70}$	=	£1,392.85 per annum

The pre 2015 pension is increased by the pension increases the Member would have received had he retired at age 65 together with an actuarial enhancement factor because the pension is commencing two years after age 65. For the purposes of this example the pension increases awarded are assumed to total 5.1% (ie an increase factor of 1.051) and the actuarial enhancement factor is 1.135. Both of these factors will change over time.

Pre 2015 Enhanced Pension	=	£2,589.28 x 1.135 x 1.051	=	£3,088.71 per annum
Total Pension	=	£3,088.71 + £1,392.85	=	<u>£4,481.56 per annum</u>

The above example only applies to Members who joined the Scheme after 1 December 1997.

Example 3: Payments on death in Employment

A *Member* dies in employment before his *Normal Retiring Date*. The details are as follows

<i>Scheme Earnings</i> at death	£24,000 per annum
Accumulated contributions at death	£4,600

The *Member* leaves a spouse or Civil Partner entitled to a spouse's or Civil Partner's pension.

Lump sum

A lump sum equal to the value of the contributions you have made to the Scheme will become payable ie

£4,600

Spouse's or Civil Partner's pension

A pension equal to 25% of *Scheme Earnings* is payable ie

$$0.25 \times \text{£}24,000 = \text{£}6,000 \text{ per annum.}$$

Child's pension

A pension equal to 25% of the spouse's pension for each child subject to a maximum of 4 children is payable ie

$$0.25 \times \text{£}6,000 = \text{£}1,500 \text{ per annum per child}$$

NOMINATION FORM FOR PAYMENT OF DEATH BENEFITS

If you wish to nominate a beneficiary to receive any lump sum payment in the event of your death please complete all relevant sections in block capitals.

Please sign and date the form and return it to: The Methodist Church, The Pensions Office, Methodist Church House, 25 Tavistock Place, London WC1H 9SF

General Data Protection Regulation (GDPR)

By completing this form, I consent to my personal information (including any sensitive personal information) being held and processed by the Trustee, the Scheme administrator and any third party appointed for the effective running of the Scheme. I understand that the Trustee, the Scheme administrator and any third parties to whom they make the data available, will comply with the underlying principles of applicable data protection legislation, including the General Data Protection Regulations.

If you wish to know more about the data held which relates to you or the purposes for which it may be used, please refer to the Scheme's data privacy statement. If you have not sighted this and wish to do so, please contact the Pensions Office by email : Pensionshelp@methodistchurch.org.uk

The Trustee may send you information about the Scheme to your work email address. If you leave employment, information may be sent to a different email address if you have provided one.

By signing this form you confirm that you have the explicit consent of the dependants whose Sensitive Personal Data you may reveal in completing this form (block capitals).

Section 1: Personal Details

Surname:	<input type="text"/>	Title:	<input type="text"/>
Forename(s):	<input type="text"/>		
NI No:	<input type="text"/>	DOB:	<input type="text"/>
Address:	<input type="text"/>		
	<input type="text"/>		
	<input type="text"/>		
	<input type="text"/>		
Post Code:	<input type="text"/>		

Section 2 : Nominating your beneficiary / beneficiaries

I note that in accordance with the provisions of the Scheme the Trustee has power in the event of my death to make payment of any cash sum payable to such one or more persons as the Trustee decides.

I would like to nominate the following to receive benefits in the proportions stated:

Full Name:	<input type="text"/>		
Address:	<input type="text"/>		
	<input type="text"/>		
	<input type="text"/>		
	<input type="text"/>		
Relationship:	<input type="text"/>	Proportion of Benefit	<input type="text"/> %

Full Name:	<input type="text"/>		
Address:	<input type="text"/>		
	<input type="text"/>		
	<input type="text"/>		
	<input type="text"/>		
Relationship:	<input type="text"/>	Proportion of Benefit	<input type="text"/> %

I understand that this notification does not restrict the absolute discretion of the Trustee under the Scheme Rules in awarding payment of such benefits. I further understand that this form cancels any similar form that I may have submitted to the Trustee.

Note: Nomination(s) may be altered at any time in the future by completing a new Nomination Form. Beneficiaries need not necessarily be restricted to two. Please continue on a separate sheet of paper, if required.

I understand that the Trustee is not bound by this nomination.

Signed Dated

The Methodist Church
The Pensions Office
Methodist Church House
25 Tavistock Place
London WC1H 9SF
Tel: 020 7486 5502

May 2023

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