

**THE INDUSTRY-WIDE COAL STAFF SUPERANNUATION SCHEME (IWCS)**

**ELECTION AND DECLARATION BY MEMBER UNDER RULE 28**

1. I, .....  
(Full name in BLOCK capitals)

Address .....

.....

have read the notes printed on the reverse side of this form and elect that the terms of Rule 28 shall apply in relation to any benefit which, but for this election, would be payable under the Scheme to my estate.

- 2. I understand that any election and declaration made by me under Rule 28 of the British Coal Staff Superannuation Scheme remains valid for the purpose of any benefits payable by that Scheme and is not superseded by this election and declaration.
- 3. It is my wish that the person(s) named below should benefit to the extent and in the manner indicated but I understand that the Committee of Management are in no way bound to have regard to such a declaration.
- 4. I also understand that this election cannot be cancelled but that the declaration setting out my wishes may be cancelled at any time by sending my written notice to this effect to the Secretary, Industry Wide Coal Staff Superannuation Scheme or varied by substituting a new declaration (see Note 6).
- 5. I declare that I am in good health.

**Please print FULL NAMES etc. in BLOCK CAPITALS**

**Share or amount  
of moneys to be  
received see Note  
3)**

(i) (Surname) ..... \*Mr/Mrs/Miss/Ms  
(Forename) .....  
of .....  
.....  
(Relationship)\*\* .....  
(Date of Birth if under 18) .....

(ii) (Surname) ..... \*Mr/Mrs/Miss/Ms  
(Forename) .....  
of .....  
.....  
(Relationship)\*\* .....  
(Date of Birth if under 18) .....

(iii) (Surname) ..... \*Mr/Mrs/Miss/Ms  
(Forename) .....  
of .....  
.....  
(Relationship)\*\* .....  
(Date of Birth if under 18) .....

(If insufficient space – see Note 4)

Dated this ..... day of ..... 20.....

Signed ..... National Insurance Number. ....  
*(Members usual signature - do not use block letters)*

\*Delete as appropriate      \*\* If not relative insert 'Dependant'      (SEE NOTES OVERLEAF)

## Notes

1. This form is for the use of a member who wishes to make an election under Rule 28 and a **declaration** of their wishes as to the person or persons for whose benefit the Committee of Management should exercise its discretion. The election gives the Committee of Management the discretionary power to pay death benefits to the relatives or dependants of the member rather than to the member's estate. The declaration is an expression of the member's wishes as to the person or persons the member wishes to benefit. The declaration is not binding on the Committee, but the Committee will take account of the member's wishes when exercising its discretion.
2. Any person who is to benefit must be a **relative or dependant**. A dependant is a spouse or child of the member or any person who, in the view of the Trustees, was wholly, or partly dependent upon the member at the time of the member's death. A relative is the member's widow, widower or a lineal descendant of a grandparent of the member or his/her spouse. If you have any queries, please contact the Industry-Wide Coal Staff Superannuation Scheme office.
3. The proposed beneficiary(ies) should either be named or described as a class e.g. 'my grandchildren' or 'the children of (named son or daughter)'. The precise amount or share, e.g. Three quarters/75%, 'one half/50%', 'one quarter/25%', the member wishes the beneficiary or class of beneficiary(ies) to receive must be clearly stated.
4. If there is insufficient space on the form for a member to name all the proposed beneficiaries, further names should be shown on a separate piece of paper attached to the form and signed and dated by the member.
5. A member may make a suitable proviso on the form as to their wishes if a proposed beneficiary was to pre-decease or not survive the member by a specified period of time.
6. A declaration (but not an election) made on this form may be cancelled at any time by notice in writing addressed to the Secretary or changed by a new declaration. It should be sent to the Industry-Wide Coal Staff Superannuation Scheme office. A member who has made a declaration should consider periodically whether it needs to be updated due to changed circumstances.
7. The form must contain your National Insurance number and an original signature.
8. The completed form should be returned to the Secretary, C/O Industry-Wide Coal Staff Superannuation Scheme, Hymans Robertson, 20 Waterloo Street, Glasgow, G2 6DB. Please do not send a photocopy. The form cannot be accepted by electronic mail.