

## ADDING BENEFICIARIES TO YOUR MEMBER SELF-SERVICE PORTAL

A beneficiary is an individual or organisation that you would like to leave your member account value to in the unfortunate event of you passing away.

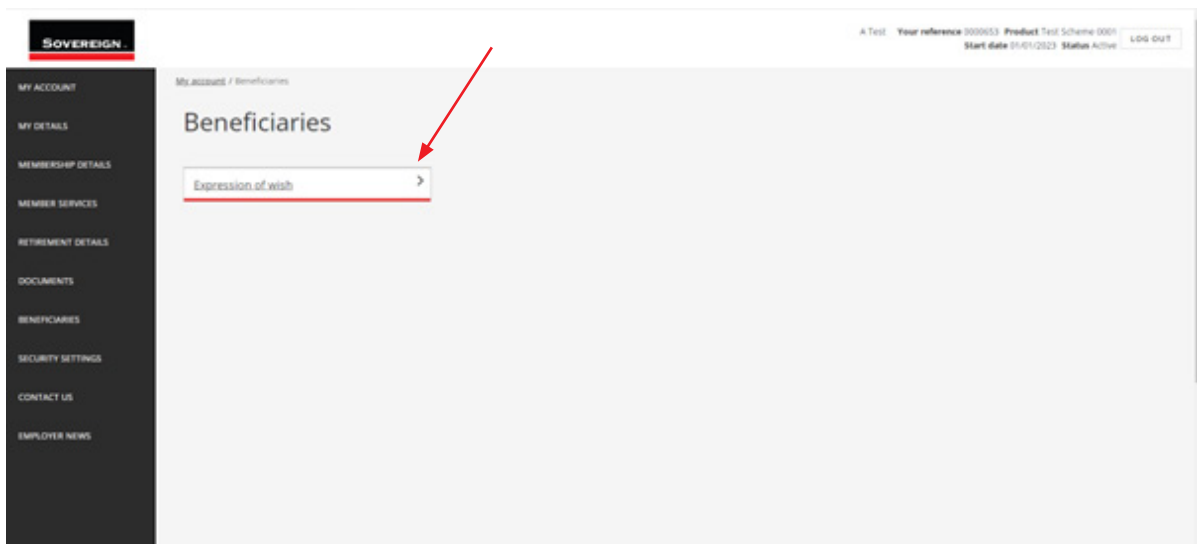
You can have one or several beneficiaries, as long as the total adds up to 100%. For example: Spouse: 50%, Child 1: 25%, Child 2: 25% = 100%.

It is important to keep your beneficiaries up to date so that the benefit goes to the people that you want it to. It is simple and easy to do.

1. Log in to your Member Self Service Portal, via the log in page.

2. Once you arrive at the landing page select **'Beneficiaries'**.

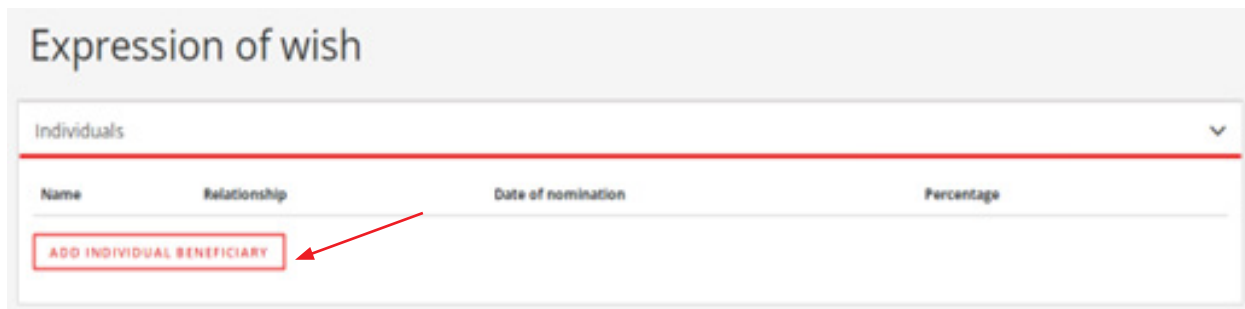
3. Select **'Expression of Wish'**.



4. Once you have selected **'Expression of Wish'** you can select whether to add an Individual or an organisation as a Beneficiary.

## Individuals

1. If you would like to add an individual as a beneficiary you need to press **'Add Individual Beneficiary'**.



2. Once you have selected **'Add Individual Beneficiary'** you will be taken to a screen where you will be asked to fill out details about the beneficiary.

**SOVEREIGN**

A Test Your reference: 0000653 Product Test Scheme 0001 Start date: 01/01/2023 Status: Active

My account / Beneficiaries / Expression of wish

### Expression of wish

Please choose the type of beneficiary. Examples of individuals are spouses, family members or friends. Examples of organisations are clubs, companies, charities or support groups.  
Please complete the details below and submit to add an individual beneficiary.

**Beneficiary details**

**Beneficiary type**  
Individual

**Date of nomination**  
06/02/2024

**Title**  
Miss

**Forenames**  
Zero

**Surname**  
Test

**Gender**  
Female

3. Once you have filled in the details and decided on what percentage you would like to leave for your beneficiary, select **'Submit'**.

**Relationship**  
Dependant

**Date of birth**  
01/08/1999

**Address**

Address  
Sulites 3a & 3b  
Frances House  
Sir Williams Place

**Town/city**  
St Peter Port

**Postal code**  
GY1 1GX

**Country**  
Guernsey

**Split details**

**Percentage**  
100%

**SUBMIT** **CANCEL**

## Organisations

1. If you would like to select an organisation such as a charity, you will need to select **'Add Organisational Beneficiary'**.

The screenshot shows the 'Expression of wish' page. On the left is a dark sidebar with a 'SOVEREIGN' logo at the top and a list of menu items: MY ACCOUNT, MY DETAILS, MEMBERSHIP DETAILS, MEMBER SERVICES, RETIREMENT DETAILS, DOCUMENTS, BENEFICIARIES, SECURITY SETTINGS, CONTACT US, and EMPLOYER NEWS. The main content area is titled 'Expression of wish' and has a breadcrumb trail: My account / Beneficiaries / Expression of wish. Below the title are two sections: 'Individuals' and 'Organisations'. The 'Individuals' section contains a table with one entry: Name: Zero Test, Relationship: Dependent, Date of nomination: 06/02/2024, Percentage: 100%. There are 'EDIT' and 'DELETE' buttons for this entry. Below the table is a red-bordered button labeled 'ADD INDIVIDUAL BENEFICIARY'. The 'Organisations' section is currently empty and has a red-bordered button labeled 'ADD ORGANISATIONAL BENEFICIARY'. A red arrow points from the 'ADD ORGANISATIONAL BENEFICIARY' button in the 'Organisations' section to the 'ADD INDIVIDUAL BENEFICIARY' button in the 'Individuals' section.

2. Once you have done this, you will be asked for details of the organisation which will be:

- Organisation Name
- Organisation Reference Number
- Address
- Percentage of your pension you would like to leave to the organisation

The screenshot shows the 'Expression of wish' page with the 'Beneficiary details' section expanded. The page title is 'Expression of wish' and the breadcrumb trail is 'My account / Beneficiaries / Expression of wish'. Below the title is a dropdown menu for 'Beneficiary details'. The main content area is titled 'Beneficiary details' and contains the following information: Beneficiary type: Organisation, Date of nomination: 06/02/2024, Organisation name: Sovereign Pension Services (C) Limited (with a green checkmark), Organisation Reference Number: 12345. Below this is the 'Address' section, which is also expanded. It contains three input fields for the address: Address: Suites 3a & 3b, Frances House, St Wilkins Place.

3. Once you have completed inputting these detail, select **'Submit'**.

The screenshot shows a web form with two main sections. The top section is titled 'Address' and contains several input fields: 'Address' (with sub-fields for 'Suites 3a & 3b', 'Frances House', and 'Sir William Place'), 'Town/city' (with 'St Peter Port' entered), 'Postal code' (with 'GY1 1GX' entered), and 'Country' (with 'Guernsey' entered). The bottom section is titled 'Split details' and contains a 'Percentage' field with '100' entered and a percentage symbol icon. At the bottom left of the form, there are two buttons: 'SUBMIT' (highlighted with a red border) and 'CANCEL'. A red arrow points from the 'SUBMIT' button to the 'Percentage' field.

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