

The Momentum Gibraltar Pension Plan

Member Notification of Death Form



Momentum Pensions Scheme Member Notification of Death Form

At Momentum Pensions, we will do everything we can to give you the support and assistance you need when dealing with bereavement and the financial responsibilities that follow.

If you need to notify us about the death of a Momentum Pensions member, please fill this form accurately and email it with all listed supporting documents to retirements@momentumpensions.com. Alternatively call our customer services team on +350 2007 6630 if you wish to discuss anything else.

This form must be completed by the person notifying us of the death of the Momentum Pensions (Gibraltar) Limited scheme member. Gathering and providing us with all the required details together in one email will reduce the number of correspondences we have with you during this difficult time. Typically this form is completed by a direct family member, appointed adviser, executor, personal representative or solicitor.

01. Deceased Member Details

Full Name

Date of Birth (DD/MM/YY)

Date of Death (DD/MM/YY)

UK National Insurance number and/or Tax Number for current tax residency

Last Residential Address

Pension Reference Number

02. Details of notifier and anyone else involved in the process

	Full Name	Relationship to Deceased	Email Address	Phone
Family member				
Executor *				
Adviser				
Administrator *				
Personal Representative*				
Solicitor				
Other				

**Where you provide details of more than one Executor, Administrator or Personal Representative or any combination, you confirm that you have individual's consent to share their details with us and you allow us to correspond with all named parties as Joint Executors.*

03. Potential Beneficiaries

Please provide details of the surviving spouse, civil partner, any financial dependents with their age or any other potential beneficiaries for consideration.

Full Name	Relationship to Deceased	Date of Birth	Email Address	Phone Number	Additional details we need to know

04. Document Checklist (please tick)

For the deceased Momentum Pensions member, please provide:

- Original Certified copy of Death Certificate (including translation if not in English)
- Original Certified copy of the Will (if applicable) (including translation if not in English)
- Or, if no Will exists then written signed and dated confirmation from the next of kin of such and a statement setting out the member's personal circumstances (in respect of marriage, all children and any other financial dependents). We will require a proof of identity of a person signing such letter.
- A copy of the adviser's original fact find, as this sometimes also sheds light on members with potentially complex personal circumstances.

*Please ensure any documents requiring certification are certified with the relevant Gibraltar certification requirements.

Information on who can certify the documents and what is acceptable as proof of identity [here](#) and proof of address is available [here](#).

05. Processing Fees

Processing Momentum Pensions (Gibraltar) Limited scheme member death claim including processing of the documents, decision and the distribution of death benefits fall outside of the standard annual pension administration fees.

There is a minimum charge of £750 (or equivalent member policy currency) that will be taken from the QROPS prior to the distribution of benefits to the beneficiaries. The Fee will be greater where there are multiple beneficiaries or the identification of beneficiaries is more complex.

06. Declaration

I confirm that the information I have provided within this form is accurate and complete to the best of my knowledge.

Signature	Printed Name
Signing in Capacity As	Date

Submission Details

Please email this completed form and all supporting documents to retirements@momentumpensions.com

If you have any questions or difficulty in completing this form, please contact our customer services team on +350 2007 6630.