

Your Island Pension (YIP) Adding Beneficiaries to your Member Self-Service Portal

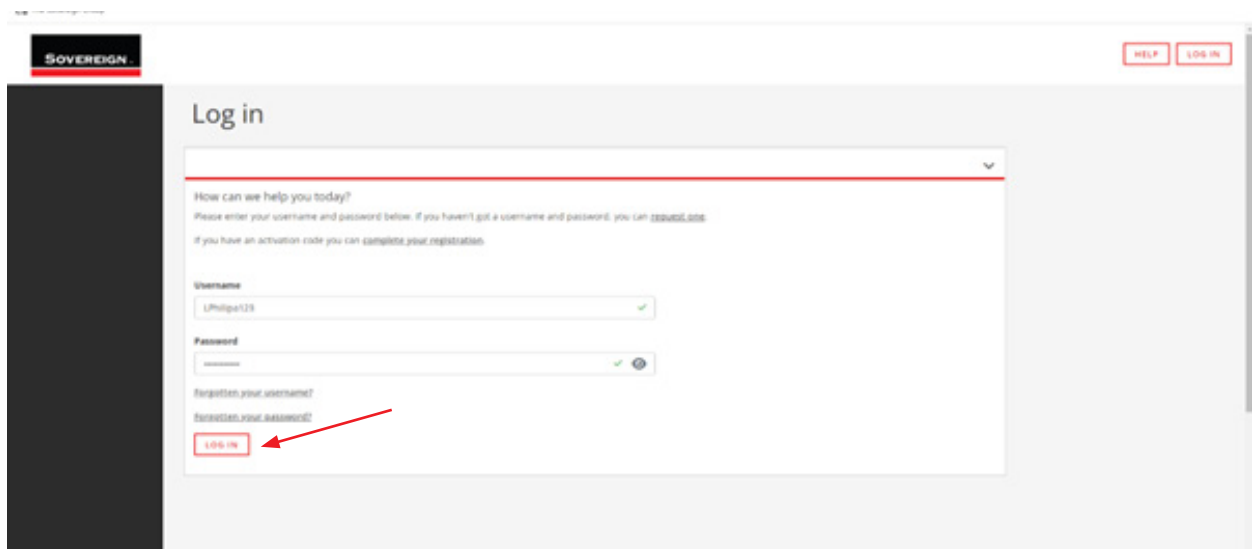
The pension built for you. Easy. Simple. Affordable.

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.

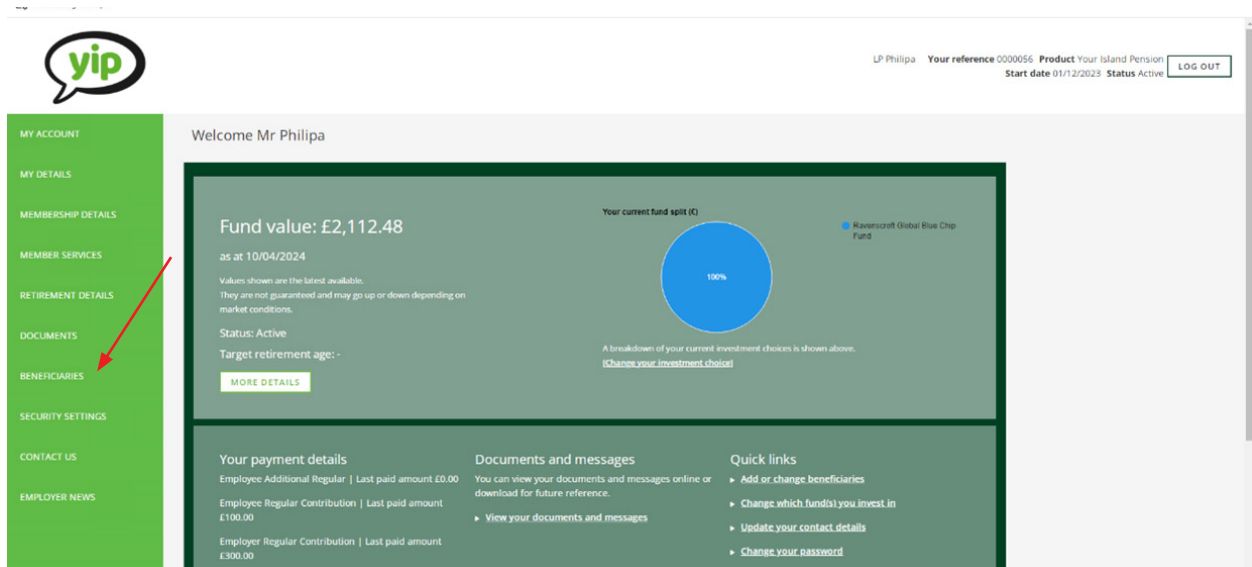
You can have one or several beneficiaries, as long as the total adds up to 100%. For example: Spouse: 50%, Child 1: 25%, Child 2: 25% = 100%

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.

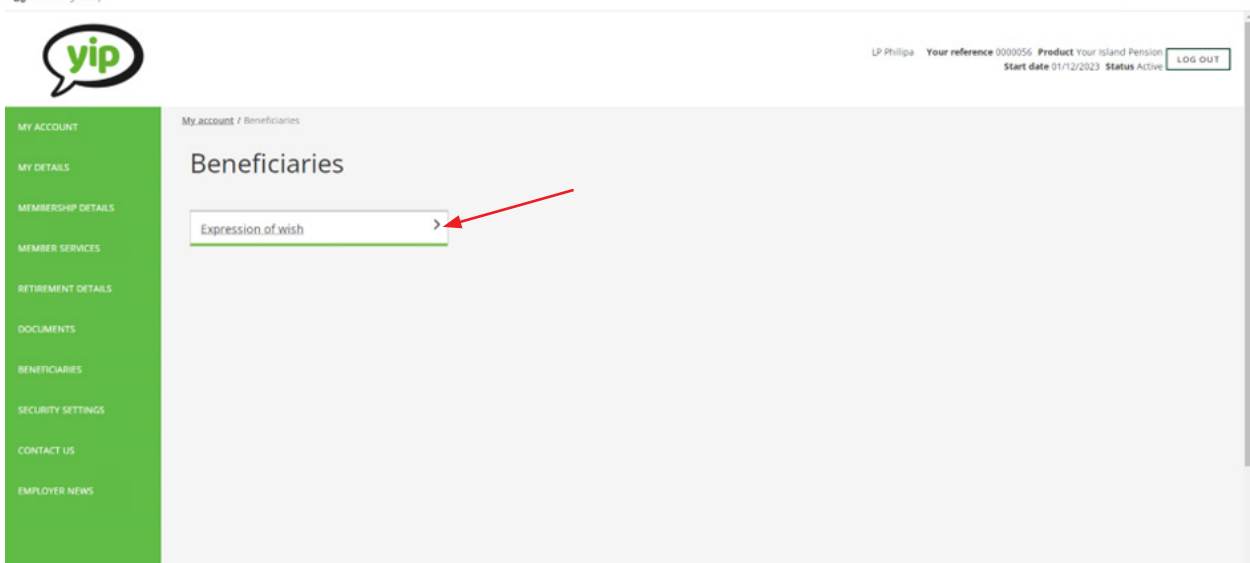
1. Log in to your Member Self Service Portal, via the log in page.



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



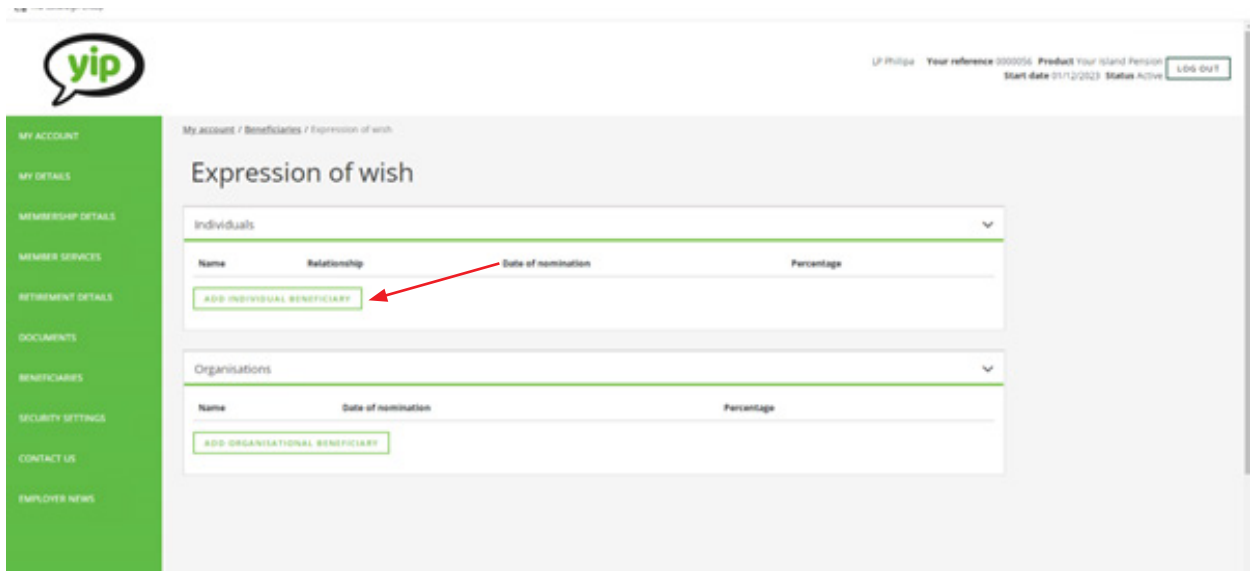
3. Select 'Expression of Wish'.



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.

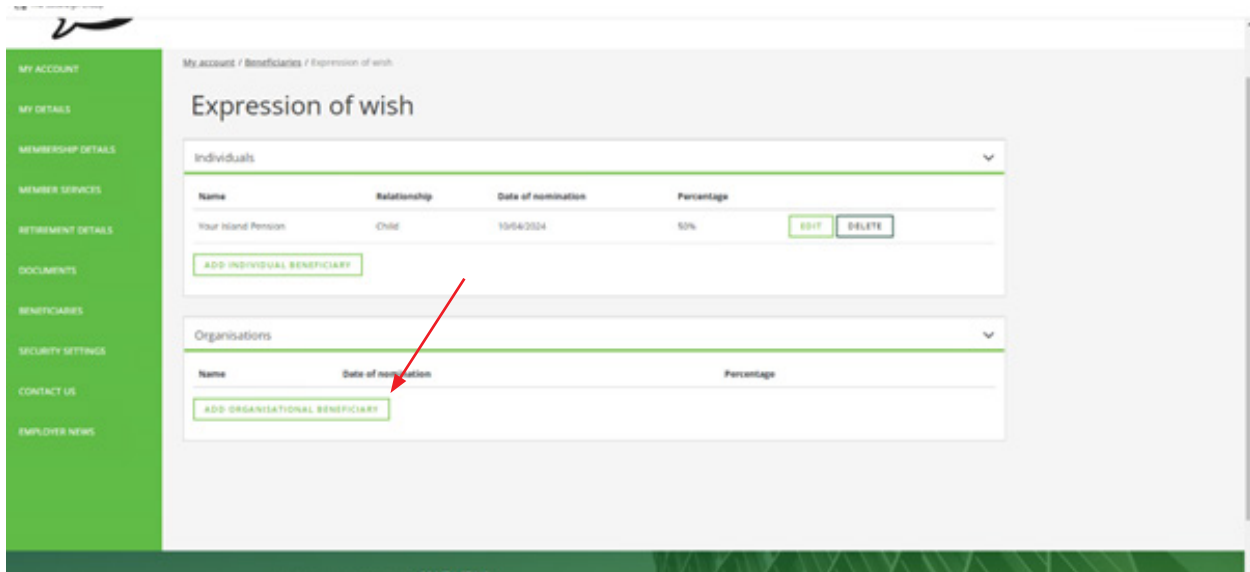
The screenshot shows a web interface titled "Expression of wish". On the left is a green navigation menu with items: MY DETAILS, MEMBERSHIP DETAILS, MEMBER SERVICES, RETIREMENT DETAILS, DOCUMENTS, BENEFICIARIES, SECURITY SETTINGS, CONTACT US, and EMPLOYER NEWS. The main content area has a heading "Expression of wish" and a sub-heading "Beneficiary details". Below this is a form with the following fields: "Beneficiary type" (Individual), "Date of nomination" (10/04/2024), "Title" (Mr), "Forenames" (Ivor), "Surname" (Island Pension), "Gender" (Male), "Relationship" (Child), and "Date of birth".

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

The screenshot shows a web interface titled "Split details". It contains a form with the following fields: "Address" (St Peter Port), "Postal code" (GY1 1GX), and "Country" (Guernsey). Below this is a "Split details" section with a "Percentage" field set to 50%. A red arrow points to the "SUBMIT" button. At the bottom of the page is a green footer with contact information for Sovereign Trust (Guernsey) Limited, including the address: SUITES 30 & 36, FINANCE HOUSE, ONE WELLS LANE PLACE, ST PETER PORT, GY1 1XK.

Organisations

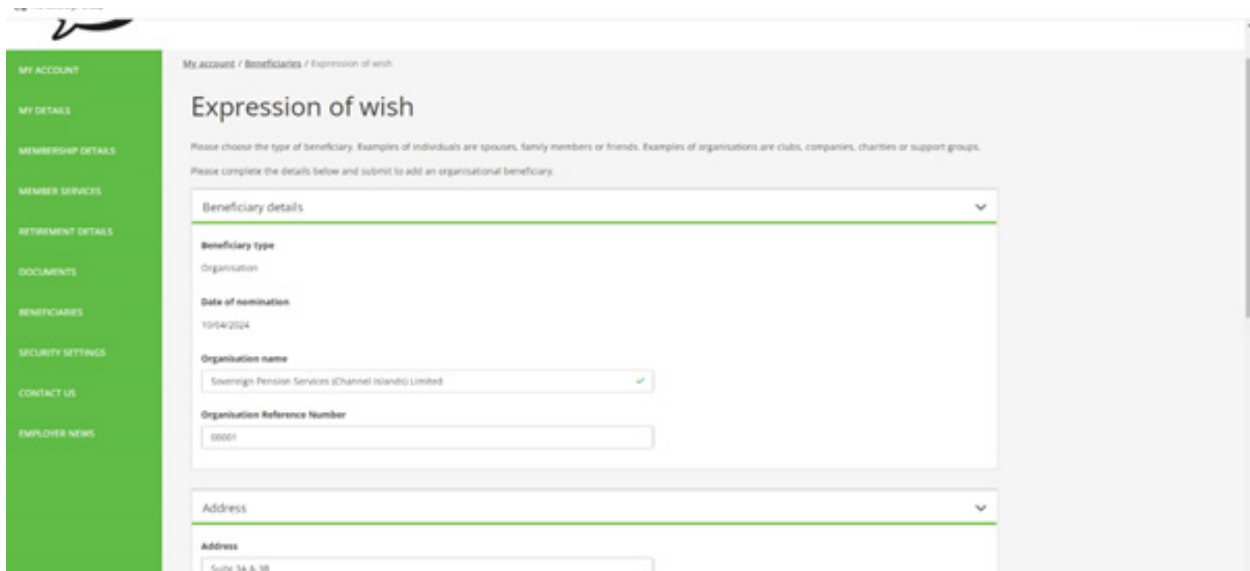
1. If you would like to select an organisation such as a charity, you will need to select **'Add Organisational Beneficiary'**.



The screenshot shows the 'Expression of wish' page. The left sidebar contains navigation links: 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'. There are two sections: 'Individuals' and 'Organisations'. The 'Individuals' section contains a table with columns: Name, Relationship, Date of nomination, and Percentage. A row is shown for 'Your Island Pension' with relationship 'Child' and date '10/04/2024', with 50% percentage. There are 'EDIT' and 'DELETE' buttons for this row. Below the table is an 'ADD INDIVIDUAL BENEFICIARY' button. The 'Organisations' section is currently empty, with columns for Name, Date of nomination, and Percentage. A red arrow points to the 'ADD ORGANISATIONAL BENEFICIARY' button in this 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' form. The left sidebar is the same as in the previous screenshot. The main content area is titled 'Expression of wish' and has a breadcrumb trail: 'My account / Beneficiaries / Expression of wish'. Below the title, there is a note: '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 organisational beneficiary.' The form is titled 'Beneficiary details' and has a dropdown menu for 'Beneficiary type' set to 'Organisation'. Below this, there are fields for 'Date of nomination' (10/04/2024), 'Organisation name' (Sovereign Pension Services (Channel Islands) Limited), and 'Organisation Reference Number' (00001). There is also an 'Address' section with a dropdown menu and a field for 'Address' (Suite 3A & 3B).

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

The screenshot shows a web form with the following fields and values:

- Residence:** St Peter Port
- Postal code:** GY1 1GX
- Country:** Guernsey
- Split details:** Percentage: 50%

At the bottom of the form, there are two buttons: **SUBMIT** and **CANCEL**. A red arrow points to the **SUBMIT** button.

The footer of the page contains the following information:

- © 2023 SOVEREIGN GROUP
- CONTACT US
- SOVEREIGN TRUST (GUERNSEY) LIMITED
- SUITES 3A & 3B, THIRD FLOOR, FRANCES HOUSE, SIR WILLIAM PLACE, ST PETER PORT, GUERNSEY, CHANNEL ISLANDS GY1 1GX
- REGISTRATION NUMBERS: 68550 AND 51015
- WWW.SOVEREIGNGROUP.COM

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