

Guardian Payout Planner – Life Cover Beneficiaries

For further details of how the Payout Planner works please refer to Guardian’s website.

Nominations can be updated at any time. Customers with complex Inheritance Tax needs should consider setting up a Trust.

Each client can have up to nine individual beneficiaries, please complete as required.

Applicant One Name

Beneficiaries

First Name	Last Name
Date of Birth	Percentage of benefit

First Name	Last Name
Date of Birth	Percentage of benefit

First Name	Last Name
Date of Birth	Percentage of benefit

First Name	Last Name
Date of Birth	Percentage of benefit

First Name	Last Name
Date of Birth	Percentage of benefit

First Name	Last Name
Date of Birth	Percentage of benefit

First Name	Last Name
Date of Birth	Percentage of benefit

First Name	Last Name
Date of Birth	Percentage of benefit

First Name	Last Name
Date of Birth	Percentage of benefit

Applicant Two Name

Beneficiaries

First Name	Last Name
Date of Birth	Percentage of benefit

First Name	Last Name
Date of Birth	Percentage of benefit

First Name	Last Name
Date of Birth	Percentage of benefit

First Name	Last Name
Date of Birth	Percentage of benefit

First Name	Last Name
Date of Birth	Percentage of benefit

First Name	Last Name
Date of Birth	Percentage of benefit

First Name	Last Name
Date of Birth	Percentage of benefit

First Name	Last Name
Date of Birth	Percentage of benefit

First Name	Last Name
Date of Birth	Percentage of benefit

Please tick to confirm the details you have provided are accurate and correct.

Once completed please send this form to your Case Manager.