



BITESIZE GUIDE

Letting us know your wishes



Making it easier for us to

# HELP YOUR LOVED ONES

Whatever your status - single, co-habiting, still figuring it out, or with an expanding family - we don't need to know all the details, but we do need to know who should get your pension savings when you die.

Visit [MyCitiPension](#), select the 'My Beneficiaries' tab under 'My Details' and follow these steps to let us know your wishes:



## To add a new beneficiary

Under 'Add Beneficiary' select 'Add New'

Input your loved one's name and the lump sum percentage you'd like them to receive

Click 'Confirm'



## To make changes to an existing beneficiary

Click 'edit details' next to your loved one's name

Change their name and / or the lump sum percentage

Click 'Confirm Allocations'



## To remove a beneficiary

Click 'remove' next to their name - don't forget to check how the lump sum is allocated to your other beneficiaries

Click 'Confirm Allocations'

**Remember, it's your money and your loved ones.**

Let us know your wishes today.