



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 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.