

Benefits Platform – Adding Beneficiaries to Life Assurance

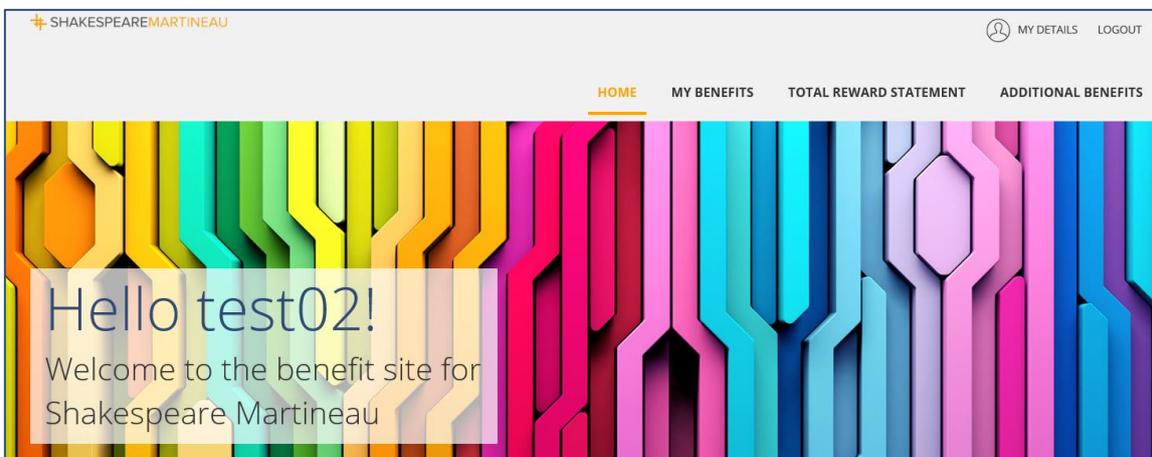
Below is an overview of the best way to add nominated beneficiaries to your Life Assurance scheme – please note you cannot delete a beneficiary who is attached to your scheme – you will need to review your beneficiaries within MY DETAILS and review the percentages within your LIFE ASSURANCE SCHEME (see below).

Log-in using the following link: <https://my.zestbenefits.com/shma/>

If you're using the benefits platform for the first time, further guidance can be found [here](#).

HOME SCREEN

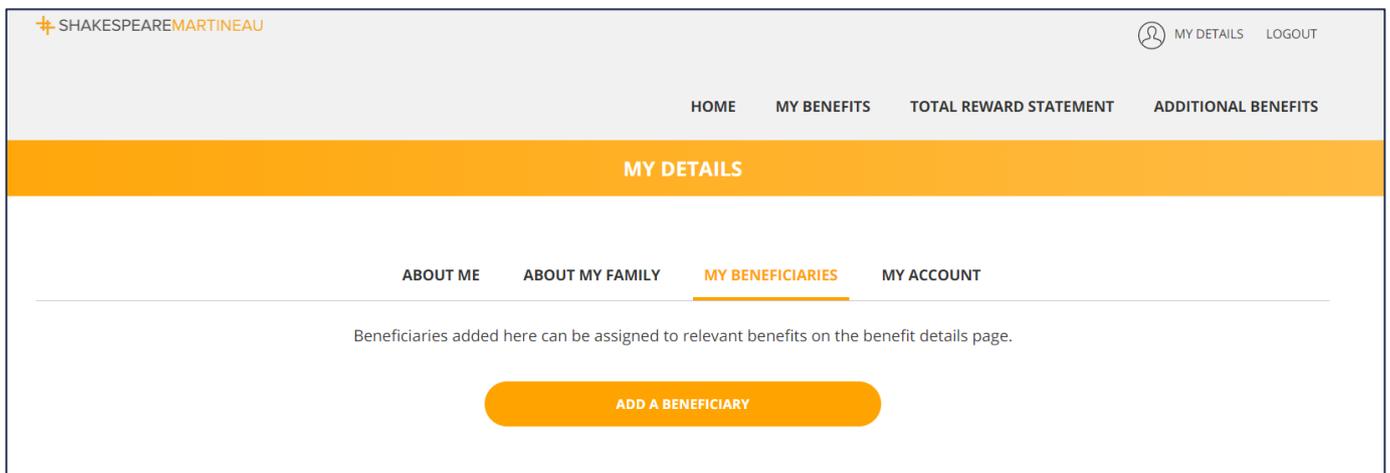
You will then be taken to your home screen (below). From here, select “My Details” towards the top right hand side of your screen.



MY DETAILS

Select the “My Beneficiaries” tab (as shown below). From here you can select “Add a Beneficiary” and enter details. You can add multiple beneficiaries using this process. *From here you can also update existing beneficiaries.*

Once you've added the details of your nominated beneficiary(s), you can add them to your Life Assurance scheme and allocate percentages by first selecting the “My Benefits” tab (shown below).



MY BENEFITS

Select your Life Assurance policy by clicking on “view” (below).

LIFE ASSURANCE SCHEME

Scroll down and you will find a request to provide details of your beneficiary(s) – click on “Add Beneficiary”:

Here you’ll be able to select your beneficiary(s) and update percentage allocations (shown below) which must add up to 100%. You’ll need to tick to confirm you understand the terms & conditions and save your changes here too.

If you have any queries please email benefits@shma.co.uk.