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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: <u>https://my.zestbenefits.com/shma/</u>

If you're using the benefits platform for the first time, further guidance can be found <u>here</u>.

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 DETAILS LOGOUT		
	HOME	MY BENEFITS	TOTAL REWARD STATEMENT	ADDITIONAL BENEFITS		
MY DETAILS						
ABOUT ME	ABOUT MY FAMILY MY B		MY ACCOUNT			
Beneficiaries added here can be assigned to relevant benefits on the benefit details page.						
ADD A BENEFICIARY						

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MY BENEFITS

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

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	НОМЕ	MY BENEFITS	TOTAL REWARD STATEMENT	ADDITIONAL BENEFITS		
	MY BENEFITS					
MY BENEFITS PACKAGE Your benefits package contains the benefits you have selected and those provided by your employer. You can view any upcoming changes using the date selector below. DISPLAY VIEW:						
ENDING 31/05/2021 Critical Illness Cover Critical Illness cover (£100,000.00) VIEW	END Life Assurance Life cover (4 x salary) VIEW	ING 31/05/2021 COVER: £167,	Pension PENSION VIEW			

LIFE ASSURANCE SCHEME

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

Please provide details of your beneficiaries for this benefit		
+		
ADD A 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.

SECOND BENEFICIARY	RELATIONSHIP Daughter	
✓ TEST BENEFICIARY	relationship Spouse	
TOTAL ALLOCATION 0.00%		
In the event of a claim being made under this policy, I wish for the full amount to be provided to the person(s) specified above in the percentage(s) shown. I understand that this is only an expression of wish, which is not binding on the trustees and which may be revoked or revised at any time by the submission of new beneficiary details. I consent to the Data Controller sharing this information with the Trustees of the scheme for the purpose of administering this policy. I understand that changes made to these details will take effect immediately.		

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