

How to Register a Death of IBM Retiree

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We are sorry for your loss; we're here to help you at this difficult time.

Please accept our condolences for your loss. We know this is a difficult time and so we've set out what you need to do from an IBM pensions perspective as simply as possible below.

To register a death, please call Pensions Services on 0118 214 3056 You will need the following details:

- The deceased's serial number.
- Their full name, date of birth and date of death.
- Details of a spouse, civil partner or financially dependent individual who may be entitled to dependant's benefits. Please note that this is only if the deceased was the original IBM pension scheme member, rather than a surviving dependant who was receiving dependant's benefits.
- The name, address and telephone number (and email address if possible) of the nominated person with whom we can deal with in respect of the death – for example, a spouse, solicitor or executor, any of whom may be yourself.

After you have registered the death, we will write to the nominated person with the information they may need for tax purposes and to request any further information we require. In all cases, we will ask them to provide a copy of the death certificate. We will also provide any forms that need to be completed to claim any benefits due to a spouse, civil partner or financially dependent individual. For spouse's benefits, we will require a copy of the spouse's birth certificate and their marriage certificate.

We will keep in touch with the nominated person until we are in a position to confirm payment of any benefits. At that point, we will always write directly to the beneficiary for privacy reasons, unless:

- The nominated person has Lasting Power of Attorney or is a Deputy appointed by the Court of Protection for the beneficiary; or
- The beneficiary has given their written consent to have information sent to the nominated person.