

# Investment *switch* form

Please complete the form in **BLACK INK** and remember to sign and date it.

Complete this form to change how your account is invested and/or to change your target retirement age.  
Please return it to Equiniti Pension Solutions at the address below.

## Section A: your details

Surname:

First name(s):

Date of birth:   /   /     National Insurance number:

Address:

Postcode:

## Section B: your investment choice

I would like my:

existing account

OR

future contributions

OR

existing account **AND** future contributions  to be invested in the following way:

NB: If you choose Lifecycle, ALL of your account must be invested in one or the other of the Lifecycle funds (please tick ONE option and provide the required information in the relevant boxes below).

### Lifecycle

A ready-made selection of investments, which automatically changes as you near your target retirement age. Please choose one of the following Lifecycle options:

#### Equity Lifecycle

Invests 100% in equities, then switches gradually to bonds and cash starting 10 years from your target retirement age

#### Mixed Lifecycle

Invests in a mix of equities and bonds, then switches gradually to bonds and cash starting 7.5 years from your target retirement age

#### My target age is

Please insert an age of 55 or above. You can change this age in future. This age is for investment purposes only; it governs when your account will be switched from equities (and bonds) to bonds and cash.

**OR**  
self-select option overleaf

## Self-select

You decide what funds to invest in, how much of your account to invest in each fund and when to make any changes.

Please choose one or more of the funds that you wish to invest your account in, by putting in whole numbers, the percentage split for each fund: (Your total must add up to 100%)

UK Equity Index Fund	%	Over 15 years Corporate Bond Index Fund	%
World (ex-UK) Equity Index Fund	%	Over 15 years UK Gilt Index Fund	%
Global Equity Index Fund (50% UK, 50% overseas)	%	Over 5 years Index Linked Gilt Index Fund	%
HSBC Life Amanah Pension Fund	%	Cash Fund	%
		Schroders Diversified Growth Fund	%

**NB: remember that investment managers' charges will be deducted from the investments held on your behalf and that the value of investments can go down as well as up. Past performance is not a guide to future performance.**

## Section C: your confirmation

Signature (member):

Date:   /   /

**Please note: the request to change your investments will be actioned as soon as practicable [and you will receive a letter confirming that the switch has taken place].**

If you would like any help filling in this form, please contact the Pensions Secretary on **01732 594516**.

### Once completed, please return this form to:

Equiniti Pension Solutions  
PO Box 556  
Crawley  
West Sussex RH10 1WS

Telephone: 01293 604085  
Email: kimberlyclarkdc@equiniti.com

### RH10 1UH For office use only

I confirm that all the details within have been checked and verified:

Name: \_\_\_\_\_ Date of actioning: \_\_\_\_\_

Expected implementation date: \_\_\_\_\_

Signed: \_\_\_\_\_ Contact number: \_\_\_\_\_