

## Affinity Water Pension Plan Money Purchase Division

### Investment Change Form – for Active Members only

Member Name: .....

NI Number: .....

I have read the guide to the Affinity Water Pension Plan and the leaflet entitled 'You Investment Choices Guide'. I have read and understood the Special Notes on page 2  (Please tick to confirm).

I wish my future contributions to be invested as shown below but my existing **Personal Account** to remain invested on the current basis.

I wish my future contributions and my existing **Personal Account** to be invested as shown below.

Please tick either the Lifestyle Option **or** Select Option box. If you choose the Select Option then please choose funds from the ten separate funds below. Please insert the percentage in the right-hand column and make sure it adds up to 100%.

TICK 1 BOX ONLY	FUND	PERCENTAGE OF YOUR PERSONAL ACCOUNT
<input type="checkbox"/>	<b>Lifestyle Option</b>	<b>100 %</b>
<input type="checkbox"/>	<b>Select Option (select funds must total 100%)</b>	
	L&G Global Equity (70:30) Index Fund	<input type="text"/>
	L&G UK Equity Index Fund	<input type="text"/>
	L&G Europe ex UK Equity Index Fund	<input type="text"/>
	L&G North America Equity Index Fund	<input type="text"/>
	L&G Japan Equity Index Fund	<input type="text"/>
	L&G Asia Pacific (ex Japan) Equity Index Fund	<input type="text"/>
	L&G Over 5 Year Index Linked Gifts Index Fund	<input type="text"/>
	L&G Pre-Retirement Fund	<input type="text"/>
	L&G AAA-AA-A Corporate Bond All Stocks Index Fund	<input type="text"/>
	L&G Cash Fund	<input type="text"/>
	<b>Total</b>	<b>100%</b>

If you do not indicate how you wish the split to be made, all contributions will be invested in the **Lifestyle** option.

Signature:	Date:

**Please return this form to the Affinity Water Payroll & Pensions Team.**

### Special Notes

- As it depends on when during the investment cycle your request is received, it is not possible to predict exactly when the switch will take place. It will happen at the first available opportunity and you will receive confirmation in writing once this has taken place. Please allow at least two months for this to be received.
- You are entitled to one free switch in any 12-month period with the Trustee paying the administration charge.
- Subsequent switches within the same 12-month period may incur an administration charge that the member is required to pay (the changes will be confirmed at the time your form is received and payment will be required in advance).