

## Changing Your Investments

You can use this form to change how you invest your pension. More details of the available investment options can be found in the [DC Investment Choices Guide](#) on the Plan website <https://www.affinitywaterpensions.co.uk/>.

### How to complete this form

- Check your details by logging into the plan website <https://secure.affinitywaterpensions.co.uk/>
- Do you want to change the funds you invest in? Complete Part A below
- Do you want to update your Target Retirement Age? If so complete Part B
- Remember to sign your confirmation in Part C so we can change your investments

### To Begin, please complete your details below:

<b>Your Name:</b>	
<b>Your National insurance number:</b>	
<b>Are your address details up to date? If not, please let us know your updated address:</b>	
<b>Your email:</b>	

### Part A: Do you want to update the funds you invest in?

If you want to invest your current investments and future contributions in a different option please let us know by ticking the relevant box below (Only tick one). If you select a Lifestyle option, all your existing and future investments will be directed here:

- I want to invest in the Income Drawdown lifestyle (default option)
- I want to invest in the Cash Lifestyle option
- I want to invest in the Annuity Purchase Lifestyle option

Or

- I want to make my own choices from a selection of funds (over the page). If you select your own funds, you cannot also select a Lifestyle option, all of your funds (existing and future) will be moved to the self-select option.

There are 8 self-select funds to choose from and you can invest in more than one fund. More details on the self-select funds can be found in the [DC Investment Guide](#) in the Plan website <https://www.affinitywaterpensions.co.uk/>.

<b>Fund name</b>	<b>Percentage (%)</b>
L&G World Equity Index Fund	%
L&G UK Equity Index Fund	%
L&G Dynamic Diversified Fund	%
L&G Retirement Income Multi Asset Fund	%
L&G Pre-Retirement Fund	%
L&G AAA-AA-A Corporate Bond All Stocks Index Fund	%
L&G Cash Fund	%
L&G Managed Property Fund	%
Total	

Please ensure the percentage totals 100%.

**Part B: Do you want to change your Target Retirement Age?**

I want to change the age that the Lifestyle option targets for me to retire at to:

I understand this will update the way that my funds are invested as I approach the target age.

**Part C: Declaration**

I understand that the choice of investments under the Plan is entirely mine. In addition I accept that, although the Trustee reviews the choice of funds periodically with their advisers, they cannot guarantee either the performance of individual funds, managers or value of the Personal Account or the benefits it will ultimately purchase.

Signed: \_\_\_\_\_ Date: \_\_\_\_\_

Please return this form to Hymans Robertson LLP, the plan administrators via email or post:

Email: [affinity@hymans.co.uk](mailto:affinity@hymans.co.uk)

Affinity Water Pension Plan  
Hymans Robertson LLP  
PO Box 27168  
Glasgow  
G2 9ND

**Need further information?**

For more information on your investment choices please contact the scheme administrators on 0207 082 6182 or email using the email above.