

PENSION SWITCH AND REDIRECTION FORM

Before you make a decision, we recommend you speak to a financial adviser to discuss the choices available to you and the implications of moving your investment. You should also read the notes below.

Please tick the plan this instruction applies to:

Personal Pension 2000 Plan

Personal Investment Pension Plan*

Personal Pension Scheme No.1 Plan*

Self Employed Plan*

Pension Savings Plan (FSAVC)*

Stakeholder Pension Plan

Notes on switching funds:

You can either choose the specific funds you wish to invest in or a lifestyle profile. Depending on which fund(s) you switch out of and in to, different fund objectives, risk ratings and charges may apply. For details of the full range of funds and lifestyle profiles available please see your funds brochure, which is available by calling us on the number shown at the back of this form.

Your Member's Booklet or Member's Policy Booklet has more information about switching funds. If you need a copy of your booklet please contact us.

Applies to Personal Pension Scheme No1, Pensions Savings Plan, Personal Investment Plan, Self Employed Plan:

Instructions to switch funds received before noon will normally be processed the following working day. Instructions received after noon will normally be processed in two working days.

We do not make a charge for switching investment funds, although we reserve the right to do so. We will notify you if this changes in the future.

Applies to Stakeholder Pension and Personal Pension 2000 Plan:

Instructions to switch funds received before noon will normally be processed the following working day. Instructions received after noon will normally be processed in two working days. There is currently no charge for switches. We will notify you if this changes in the future.

Continued

Applies to Personal Pension Scheme No.1 Plans only:

If income drawdown payments are being taken from specific funds and, following the switch, an insufficient amount is left to make these payments, we will need a new instruction detailing where the payments should be made from. If we do not receive a new instruction, future income drawdown payments may be delayed.

Applies to the plans that can invest in the With Profits Fund:

You can't move your fund into the With Profits fund if there are five years or less to your selected retirement date or you are taking Flexi-Access drawdown. If you are moving out of With Profits before your selected retirement date we may reduce the value of your investment by a Market Value Reduction (MVR). We use MVRs to treat With Profits customers fairly, whether they stay in With Profits fund or withdraw from it early. The main circumstance when we might apply a MVR is when investments such as shares or commercial property haven't performed as well as we've allowed for when setting bonuses. These values can change frequently. So you should expect that at some time during your investment these conditions may apply.

If your plan has any contractual additions, such as Contractual Annual Interest (CAI) or Contractual Minimum Addition (CMA), you will no longer receive these if you switch out of the With Profits fund. This means you may get lower investment growth rate from the fund that you switch into. You can see if CAI or CMA applies to your plan by checking your annual bonus declaration letter or plan documents. These guarantees are very valuable. For example, if your plan has any CAI, the rates of interest are guaranteed to remain the same until your normal retirement date if you stay in the With Profits fund. We recommend that you get financial advice before making your final decision.



Please print, sign and complete this form so we can process your instruction. We'll accept this by fax or post.

1

YOUR DETAILS

Arrangement number

Title

Full name

Date of birth (DDMMYYYY)

National Insurance number

Phone number (Home)

Mobile number

Email address

If you have more than one arrangement number, you only need to specify one of the numbers above.

2

TYPE OF SWITCH

Tick **ONE** box only

Switch existing units and change fund choice for future contributions (complete sections 3, 4 and 6)

Switch existing units only, leaving the fund choice for future contributions as it is (complete sections 4 and 6)

Change fund choice for future contributions only, leaving existing units as they are (complete sections 3 and 6)

Select a lifestyle profile (complete sections 5 and 6)

3

FUTURE CONTRIBUTIONS

Please complete this section if you wish to change the fund allocation of your future single and regular contributions.

Fund name	Regular contributions %	Single contributions %
Total	100%	100%

A lifestyle profile is a standalone option and cannot be chosen in combination with any other fund within your plan. If you choose a lifestyle profile it will be applied to all Formerly Protected Rights AND Non Protected Rights (including pension credits) within your plan.

Lifestyle profiles are not available if you are taking income drawdown.

Lifestyle Profile Name	% of plan invested
	100%

I understand that I should read the notes on pages 1 & 2 of this form.

I understand the switch is subject to the conditions shown in my Member's Booklet/Member's Policy booklet.

I authorise Legal & General to switch my fund(s) and alter my fund choice for future contributions in accordance with the instructions on this form.

Your
Signature

Date (DDMMYYYY)



Please return the completed form to:

Asset Management Team
Legal & General
City Park
The Drove
Hove
BN3 7PY

Or fax back to: **0345 070 6365**



legalandgeneral.com

Legal & General Assurance Society Limited
Registered in England and Wales No. 00166055
Registered office: One Coleman Street, London EC2R 5AA

Authorised by the Prudential Regulation Authority and regulated by the Financial Conduct Authority and the Prudential Regulation Authority.

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