

FUND SWITCH AND REDIRECTION FORM

Please use this form to switch or redirect funds that are held in one of the following Legal & General pensions:

Company Pension Plan

Company Sponsored AVC Plan

Executive Investment Retirement Plan

Directors Plan

Executive Pension Plan

1. Please see our **Investment Options** brochure for details of the funds available.
2. 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.
3. You cannot move your fund into With Profits if there are five years or less to your normal retirement date.
4. If you are switching out of With Profits before your normal retirement date we may reduce the value of your investment by a Market Value Reduction. We use Market Value Reductions to treat With Profits customers fairly, whether they stay in With Profits or withdraw from it early. The main circumstance when we might apply a Market Value Reduction 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. Please refer to our With Profits brochure online, at legalandgeneral.com/with-profits in the 'Guides and factsheets' section.
5. 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 a 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 can be 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 seek financial advice before making your final decision.
6. If you are invested in a fund that invests in property, it may be necessary to defer encashment of units during periods when property is not easily sold. Also, property valuations are based on the opinion of independent property experts, not fact, so can be liable to revision, up or down.
7. You can only invest into one lifestyle profile at a time. This means that you must always include a full 100% switch if you wish to make any lifestyle profile investments.
8. Requests to switch funds received before noon will normally be processed the following working day. Requests received after noon will normally be processed in two working days.

1

MEMBER DETAILS

Title

Surname

First name(s)

National Insurance number

Policy number

2

CHANGE OF FUND CHOICE

Please indicate type of change required (tick one box)

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 3 and 6)Change fund choice for future contributions only, leaving existing units as they are
(complete sections 4 and 6)Select a lifestyle profile
(complete sections 5 and 6)

Other (please specify with brief description)

3

SWITCH EXISTING UNITS

Your switch instruction will be applied to all your Formerly Protected Rights and/or Non Protected Rights under your plan, as you request below.

Please specify whether you want to switch:

Formerly Protected Rights only

Non Protected Rights (including pension credits) only

Both Formerly Protected Rights and Non Protected Rights (including pension credits)

3a Funds you wish to switch out of

Please specify the fund name and percentage of your existing fund holding that you wish to switch out of.

Fund name	% of the fund holding to switch out
<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>

3b Funds you wish to switch in to

Please specify the fund name and allocation of the proceeds switched out in section 3a, for the funds you wish to switch into.

Fund name	% of the proceeds you wish to switch in
<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>
Total	100%

4 FUTURE CONTRIBUTION ALLOCATION

Name of fund	Regular (%)	Single (%)
	%	%
	%	%
	%	%
	%	%
Total	100%	100%

5 LIFESTYLE PROFILE

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 Profile Name	% of plan invested
	100%

6 TRUSTEE AUTHORISATION

We authorise Legal & General to carry out the instructions given in this form and in accordance with the terms and conditions of the scheme.

Trustee's signature

Date

(DD/MM/YYYY)

Trustee's signature

Date

(DD/MM/YYYY)

(Please note that we require a Trustee's signature, NOT the member's.)



Please sign the completed form and send it to us at:

Legal & General Assurance Society Limited
Asset Management Team
City Park
The Drove Way
Hove
BN3 7PY



Or you can email your investment instructions to us at AMT@landg.com



or fax your form to **0345 070 6365**.



If you have any questions about completing this form, please give us a call on **0345 073 0778**.
Call charges will vary. We may record and monitor calls.



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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