



Flexible Retirement Plan

Fund Switch Form

Please complete in block capitals and tick boxes where necessary and return to address overleaf.

Member details

Member Number(s): _____

Member Name: _____

Section 1 – Fund switch

Please cancel existing units as shown below:

Existing fund(s)	<input type="checkbox"/>	% of funds to be cancelled
Managed Fund	<input type="checkbox"/>	_____%
Pre-retirement Fund	<input type="checkbox"/>	_____%
Socially Responsible Investment Fund	<input type="checkbox"/>	_____%
Global Equity Fund	<input type="checkbox"/>	_____%
Index-Linked Fund	<input type="checkbox"/>	_____%
Bond Fund	<input type="checkbox"/>	_____%
Property Fund	<input type="checkbox"/>	_____%
Cash Fund	<input type="checkbox"/>	_____%
Diversified Ethical Fund	<input type="checkbox"/>	_____%
Default Fund	<input type="checkbox"/>	100%

Please put the value of the cancelled units into the following funds. I understand that a switch charge, if appropriate, will be deducted from this amount, as stated in the Scheme booklet.

New fund(s)	<input type="checkbox"/>	% to be allocated to the fund
Managed Fund	<input type="checkbox"/>	_____%
Pre-retirement Fund	<input type="checkbox"/>	_____%
Socially Responsible Investment Fund	<input type="checkbox"/>	_____%
Global Equity Fund	<input type="checkbox"/>	_____%
Index-Linked Fund	<input type="checkbox"/>	_____%
Bond Fund	<input type="checkbox"/>	_____%
Property Fund	<input type="checkbox"/>	_____%
Cash Fund	<input type="checkbox"/>	_____%
Diversified Ethical Fund	<input type="checkbox"/>	_____%
Default Fund	<input type="checkbox"/>	100%

TOTAL **100 % (of new fund(s))**

Please note: 100% of existing funds and future contributions only can be invested in the default funds, it is not possible to invest a proportion of your funds into the default option.

PLEASE SEE SECTIONS 2 AND 3 ON THE REVERSE OF THIS FORM.

Flexible Retirement Plan

Section 2 – Allocation of future contributions

Please allocate future contributions as shown below:

Managed Fund	<input type="checkbox"/>	_____%
Pre-retirement Fund	<input type="checkbox"/>	_____%
Socially Responsible Investment Fund	<input type="checkbox"/>	_____%
Global Equity Fund	<input type="checkbox"/>	_____%
Index-Linked Fund	<input type="checkbox"/>	_____%
Bond Fund	<input type="checkbox"/>	_____%
Property Fund	<input type="checkbox"/>	_____%
Cash Fund	<input type="checkbox"/>	_____%
Diversified Ethical Fund	<input type="checkbox"/>	_____%
Default Fund	<input type="checkbox"/>	100%
TOTAL		100 %

Please note: 100% of existing funds and future contributions only can be invested in the default funds, it is not possible to invest a proportion of your funds into the default option.

Section 3 – Written authorisation

- Please sign below:
- Future contributions will be invested in funds selected in section 2
- The Pensions Trust suggests that you consider taking independent financial advice before making your decision to switch funds

1. I have not received any advice from any employee of The Pensions Trust about this instruction
2. I understand that this request will be carried out in accordance with the rules of the Flexible Retirement Plan
3. I understand the value of my fund is subject to market conditions and may reduce depending on my investment choice.
4. I have read the Scheme Booklet and understand the possible implications of switching funds

Signed: _____ **Date:** ___/___/___

Full Name: _____



The Pensions Trust