



Flexible Retirement Plan

Employee Application Form

MEMBERSHIP NUMBER To be completed by The Pensions Trust: <input type="checkbox"/> M <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>

EMPLOYEES ARE REQUIRED TO FULLY COMPLETE SECTIONS 1-4 AND SIGN THE DECLARATION

1. Your details

Title: Mr Mrs Miss Ms other (please state): _____ Male Female

Surname: _____ Forename(s): _____

Address: _____

Postcode: _____

Telephone Number: _____ Email: _____

Date of Birth: ____/____/____

Status: single married widow(er) divorced civil partner

National Insurance Number:

Please advise The Pensions Trust of any future changes of address or status.

2. Investment choice

Selected Retirement Age

Please indicate your intended retirement age which may be any age between 55 and 75: _____

Now, please choose either A) the Default Option OR B) provide your own Investment Options:

A) Default Option

The default investment option for members who are more than six years from their selected retirement age is the Managed Fund.

The default investment option for members who are six years or less from their selected retirement age is the Pre-Retirement Fund.

I wish the Default Option to apply to my plan (please tick box)

OR see section B)

Flexible Retirement Plan

B) Your Investment Options

You must select your choice of investment fund(s) for your Flexible Retirement Plan before joining the Plan. If no choice is indicated or your choices do not add up to 100%, the contribution or remaining contribution will be invested in the Default Option.

Managed Fund	<input type="checkbox"/>	_____%	Index-Linked Fund	<input type="checkbox"/>	_____%
Pre-Retirement Fund	<input type="checkbox"/>	_____%	Bond Fund	<input type="checkbox"/>	_____%
Socially Responsible Investment Fund	<input type="checkbox"/>	_____%	Property Fund	<input type="checkbox"/>	_____%
Global Equity Fund	<input type="checkbox"/>	_____%	Cash Fund	<input type="checkbox"/>	_____%

TOTAL 100%

Lifestyle Option

Members will be invited to participate in the Lifestyle Option when they are within seven years of their selected retirement age.

Please note that you are permitted one investment switch a year.

3. Previous pension arrangements

Have you ever previously been a member of The Pensions Trust? Yes No

If yes, please give membership number, if known: M

and the name of the employer: _____

4. Promotional DVD

4a. Are you completing this Application Form having viewed The Pensions Trust's Flexible Retirement Plan DVD, 'Your Pension Made Easy'? Yes No

4b. If yes, did watching the DVD 'Your Pension Made Easy' have any influence on your decision to join the Plan? Yes No

EMPLOYEE'S DECLARATION

I hereby apply to become a member of The Pensions Trust's Flexible Retirement Plan and I agree to be bound by the terms and conditions of the Flexible Retirement Plan as set out in the Trust Deed and Rules. I understand the value of my fund is subject to market conditions and may reduce depending on my investment choice and I confirm that I have read the Flexible Retirement Plan 'A Guide for Members' and the information as to the risks associated with my chosen investment option(s).

I consent to the processing of the data included in this form and any further personal information supplied by me or my employer.

I authorise my employer to deduct the agreed pension contributions from my salary (if appropriate).

Signed: _____ **Date:** ____/____/____

Full Name: _____

In order that we can send you a pension forecast that includes information about your state pension, we need to obtain some information about you from the Department for Work and Pensions (DWP). To get that information we need to disclose your personal details to the DWP.

If you do not wish us to contact the DWP for this information, please tick this box
As a result of this, the pension forecast you receive from us will not include state pension information.

For further information on the above, please refer to our website
www.thepensiontrust.org.uk

EMPLOYERS ARE REQUIRED TO FULLY COMPLETE THIS PAGE

5. Employer details

Name of Organisation: _____

Employer Reference Number: E

Normal Retirement Age: _____

Employer Contribution Rate: _____%

Employee Contribution Rate: _____%

Date employee joined employment: ____/____/____

Payroll Number: _____

Contractual hours per week: _____

Standard Full-time Hours: _____

Annual Pensionable Salary: £ _____ p.a.

Please note the Plan start date will be automatically set by The Pensions Trust as the month in which we receive the first contribution payment in respect of the member.

Declaration for late entrants

This declaration is in respect of an employee applying to join the Scheme later than one year from becoming eligible to do so (Trust Deed and Rules: Common Rule 3.4 applies).

Has the employee completed three months' continuous service without absence through illness or injury immediately prior to the date they wish to join the Plan? Yes No

If **No**, please give details of the period(s) of absence and the reason. (Please use an additional sheet if required).

Date(s) of absence

Reason for absence

_____ to _____

_____ to _____

If the member has not completed three months' continuous service, the enrolment may be postponed until this criterion has been met. Should this be the case, you will be contacted by The Pensions Trust.

EMPLOYER'S DECLARATION

I certify that the applicant is an employee of our organisation and I agree to ensure that contributions are paid to The Pensions Trust on behalf of this employee.

I understand contributions must be received by The Pensions Trust within legal time limits and must not be deducted before I receive confirmation that the employee has been enrolled.

Signed: _____ Date: ____/____/____

Full Name: _____

Position: _____

Email: _____

The completed form should be sent to the Flexible Retirement Plan Team at the address below. Any queries please call 0113 234 5500 or email frp@thepensiontrust.org.uk

