

Changing your investments form

Please use this form to tell us how you would like to change your pension investments. This can apply to the money you've already paid in as well as the money you pay in the future, or both.

Important Notes:

You can register for our online service, Manage Your Account at legalandgeneral.com/workplacebenefits. If you have already registered with us, you can also change where your money is invested online.

1. Before you fill out this form did you know that you can manage your pension funds online. Why not log onto legalandgeneral.com/workplacebenefits/employees and take a look now?
2. You can email a signed copy of this form to us at switch.referrals@landg.com. Alternatively, you can post the completed form to the address shown on the last page in section 6.
3. You can find full details of the investment choices that are available to you, by clicking on the relevant Fund Information link in the Fund Zone of our Workplace benefits website legalandgeneral.com/fundzone_wps
4. You may invest in up to 50 different funds for your plan. There is no charge for changing how you invest your money, but we will write to you if this changes in the future.
5. To find out what terms and conditions apply when you change your investments, please see your Member's booklet.
6. If you choose to invest in a fund that invests in property, we might have to delay encashing the units during periods when property can't easily be sold. The maximum delay is six months.
7. If you are a Group Personal Pension 2000 customer wanting to switch out of the With Profits fund before your selected retirement age, we may reduce the value of your investment by a market value reduction. Please refer to the 'Introduction to Unitised With Profits' brochure for more details. The With Profits fund is not available under our Group Stakeholder Pension Scheme or WorkSave Pension Plans.

If you have a Group Stakeholder or Group Personal Pension, we will carry out your investment instructions on the same day if we receive them before 12 noon. If we receive them after 12 noon we will deal with them on the following working day.

If you have a WorkSave Pension Plan, we will carry out your investment instructions on the same day if we receive them before 4pm. If we receive them after 4pm we will deal with them on the following working day.

1 About you

Mr/Mrs/Miss/Ms/other

Surname

First name(s)

Home telephone number

Mobile

Email address

Arrangement number

Name of your employer

National Insurance number

Date of birth

D	D	M	M	Y	Y	Y	Y	



2 What investment changes do you want to make?

Change how your existing money is invested and alter fund choice for the money you pay in the future **(complete sections 3, 4 and 6)**

Only change how your existing money is invested, while leaving the fund choice for the money you pay in the future as it is **(complete section 3 and 6)**

Only change where the money you pay in the future is invested, leaving your existing money where it is **(complete sections 4 and 6)**

Select a lifestyle profile **(complete sections 5 and 6)**

Tick **ONE** box only

3 Do you want to move the money that you've already paid in?

The instructions you give us below will be applied to all monies held in your pension pot (including any formerly Protected Rights rebates).

From Name of fund(s)	Fund code	Percentage of pension pot to be moved (%)	To Name of fund(s)	Fund code	New allocation (%)	
Please ensure that the percentages above add up to 100%					Total	100%

4 How would you like to invest the money you pay in the future?

To – Name of fund(s)	Fund code	Regular amounts (%)	One-off amounts (%)
Please ensure that the percentages above add up to 100%		Total	100%
		Total	100%

If you would like to change the fund allocation of your formerly Protected Rights money (also known as contracting out rebates), please write your instructions in the box below.

5

Do you want to invest in a lifestyle profile?

As an alternative to investing individual funds, you can choose to invest in one of our 'lifestyle profiles' instead. Please log in to Manage Your Account to see which lifestyle profiles are available to you.

If you do decide to invest in a lifestyle profile please be aware that you can either invest in individual funds, OR a lifestyle profile at any one time. You can't be in a combination of both. So if your money is currently invested in a lifestyle profile and you make any investment changes, we'll move all the money you've already paid in and your future money out of your existing lifestyle profile.

It's also not possible to choose a lifestyle profile if you're taking income drawdown.

Name of lifestyle profile	Fund code	Percentage of your money invested
		100%

6

Your authorisation

I hereby authorise Legal & General to move my existing money and/ or move any amounts I pay in the future including any one-off amounts in accordance with my instructions on this form. I understand that any changes I make to my investments are subject to the conditions shown on page 1.

Member's signature:

DDMMYYYY

Date:



You can email your investment instructions to us at switch.referrals@landg.com

Or you can post your completed form to the following address:

Workplace Pensions
 Legal & General
 Knox Court
 10 Fitzalan Place
 Cardiff
 CF24 0TL

If you have any questions about completing this form, please give us a call on **0345 070 8686**. Lines are open between the hours of 8.30am and 7pm Monday to Friday and 9am to 12 midday Saturday. Call charges will vary. We may record and monitor calls.

Legal & General (Portfolio Management Services) Limited

Registered in England and Wales No. 2457525

We are authorised and regulated by the Financial Conduct Authority.

Legal & General Assurance Society Limited

Registered in England and Wales No. 00166055

We are authorised by the Prudential Regulation Authority and regulated by the Financial Conduct Authority and the Prudential Regulation Authority.

Registered office for both companies: One Coleman Street, London EC2R 5AA.

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