FUND SWITCH AND REDIRECTION FORM.

IMPORTANT INFORMATION AND CONDITIONS

1. Before you fill out this form did you know that you can manage your pension funds online? Why not log onto **www.legalandgeneral.com/workplacebenefits/employees** and take a look now?
2. We will process switch and redirection instructions on the same day if we receive these before 12.00 noon. Any that we receive after 12.00 noon will be processed on the following working day.
3. At the time of writing we do not charge for switches or redirections. We will let you know if this changes.
4. If you are switching out of With Profits before your selected retirement age, we may reduce the value of your investment by a market value reduction. Please refer to your With Profits brochure for more details. With Profits is not available as an investment under the Stakeholder Pension Scheme.
5. If you invest in a fund that invests in property, it may be necessary to defer encashment of units during periods when property is not easily sold. The maximum delay is six months.
6. You can only invest and pay contributions into one lifestyle profile at a time. This means that you must always include a full 100% switch and redirection of contributions if you wish to make any lifestyle profile investments.

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PLEASE NOTE

Protected Rights are funds that have been built up from being contracted out of the State Second Pension (formerly SERPS). The Government stopped contracting out from 6 April 2012. From this date, any Protected Rights you have will be known as 'Formerly Protected Rights'.

GLOSSARY OF TERMS

Regular contributions
These are paid to Legal & General on a regular basis and may be amounts from yourself and/or your employer.

Single contributions
These are one-off amounts that are not sent to Legal & General on a regular basis. They may be amounts from yourself and/or your employer.

Benefit Type
This is how we describe the different types of contribution you could pay into your plan. This will be your regular, single or contracted-out rebate contributions.

Switch
This is if you want to change the fund allocation of your existing contributions.

Redirection
This is if you want to change the fund allocation of your future contributions.

Lifestyle profile
This is an alternative investment option to choosing an individual fund, or funds. You can only be in one lifestyle profile at a time and you also cannot invest in any other funds at the same time.

Fund Code
Each of the funds available to you has a unique four digit numerical code. A description of the funds along with their codes can be found in the 'Investment Options' brochure which is available on line.

EVERY DAY MATTERS.®

Legal & General

1 ABOUT YOU

Full name	Mr/Mrs/Miss/Ms/Other	
	Surname	
	First names	
Contact details	Daytime phone number*	
	Email address	
Your plan details	Plan number	
Other details	Employer's name	
	National Insurance Number	

*It is important we have this in case we need to contact you to clarify your request. This could be a mobile number if you have one.

2 WHAT WOULD YOU LIKE TO DO?

	Please tick
Choose or change to another lifestyle profile **(please complete section 3)**	
Switch existing contributions **(please complete section 4)**	
Redirect future contributions **(please complete section 5)**	

3 LIFESTYLE PROFILE

You can choose to invest in one of a range of lifestyle profiles. For Group Stakeholder Pension Scheme members, you will find details at **www.legalandgeneral.com/investshp**. If you're a member of a Group Personal Pension 2000 Scheme, please go to **www.legalandgeneral.com/gpp** Remember a lifestyle profile is a standalone option and can't be chosen in combination with any other fund within your plan. If you choose a lifestyle profile it will be applied to all Non Protected and Formerly Protected Rights monies held in your plan.

If you are currently invested in a lifestyle profile and you make any changes, we'll switch and redirect you out of your existing lifestyle profile. It's also not possible to choose a lifestyle profile if you're taking income drawdown.

Lifestyle profile name	Fund code	Percentage of plan invested
		100%

4 EXISTING CONTRIBUTIONS

If you want to switch all of your existing contributions, **please complete section 4a**.
If you want to switch part of, but not all of your existing contributions, **please complete section 4b**.
If you have a specific request that is not covered by the above options, **please write your instructions in section 4c**.

4a TO SWITCH ALL OF YOUR EXISTING CONTRIBUTIONS

If you want to switch a specific benefit type in isolation, **please write this clearly in part 4c**. If you do not specify a benefit type we will switch all of the contributions held in your plan.

To – Name of fund	Fund code	New allocation (%)
Example new fund name	ABCD	100%

4b SWITCH PART OF YOUR EXISTING CONTRIBUTIONS

If you want to switch a specific benefit type in isolation, **please write this clearly in part 4c**.
Do not complete this section if you want to switch into a lifestyle profile. **Please go to section 3 instead.**

From – Name of fund	Amount of fund to be switched (%)	To – Name of fund	Fund code	New allocation (%)
		Example new fund name	WXYZ	40%
Example fund name	40%	Example new fund name	EFGH	60%
		Please ensure that the percentages total 100%	Total	100%

4b SWITCH PART OF YOUR EXISTING CONTRIBUTIONS – continued

From – Name of fund	Amount of fund to be switched (%)	To – Name of fund	Fund code	New allocation (%)
		Please ensure that the percentages total 100%	Total	100%

4c OTHER REQUESTS

5 FUTURE CONTRIBUTIONS

If you wish to change the fund allocation of your future regular contributions, single contributions and/or contracting-out rebates, **please complete this section.**

Name of fund	Fund code	Regular contributions (%)	Single contributions (%)	Contracting-out rebates (%)
Please ensure the percentages total 100% Total	100%	100%	100%	100%

6 YOUR AUTHORISATION

I hereby authorise Legal & General to switch my existing contributions and/or redirect future regular contributions, single contributions and/or contracting-out rebates in accordance with this instruction. I understand that the switch is subject to the conditions detailed on page 1.

Signature of member, parent or legal guardian

Date D D M M Y Y Y Y

Please return the completed form to the following address:

Legal & General Assurance Society Limited
Workplace Benefits: Pensions
2nd Floor Knox Court
10 Fitzalan Place
Cardiff
CF24 0TL

Fax 029 2043 2372

If you have any questions about completing this form, please give us a call on 0845 070 8686.
Call charges will vary. We may record and monitor calls.

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

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

We are a member of the Association of British Insurers.

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