

# INVESTMENT SWITCH FORM



## PERSONAL DETAILS (Please complete in BLOCK CAPITALS)

Full name \_\_\_\_\_ Company location \_\_\_\_\_  
 NI number \_\_\_\_\_ Personnel number \_\_\_\_\_  
 Employing company \_\_\_\_\_ Phone/email \_\_\_\_\_

Please read the investment section of the FuturePlanner website ([www.futureplanner.co.uk](http://www.futureplanner.co.uk)) before completing this form. Investment changes will be made at the next available payroll. Forms received after the 23rd of each month will be actioned for the following month's payroll.

The Rules of Leonardo FuturePlanner allow the Trustees to levy a charge for switching investments. However, for the time being, the Trustees have decided not to levy this charge. You will be notified should this change.

## YOUR INVESTMENT CHOICES

Please tick one of the following boxes and complete the details below:

- If you are a Default member but you want to switch to Pick & Mix, please complete Section A of this form. Please note that if you wish to switch out of Default then your existing funds will become Pick & Mix and remain in the fund in which it is currently invested (unless you choose to redirect your existing fund) and will not be switched in accordance with the Default lifestyle process as you approach retirement.
- If you are a Pick & Mix member who wants to change your future or existing Pick & Mix options, please complete section B of this form.
- If you are a Pick & Mix member who wants to switch to Default, please complete Section C of this form. Please note that if you switch to the Default option, both your existing Retirement Account and your future contributions will be invested in accordance with the Default lifestyle process.

Remember that you can check and change your current investment choices online, whenever you want. Just go to [www.futureplanner.co.uk](http://www.futureplanner.co.uk) and visit 'My Account'. If you need help completing this form, please contact PSAL using the details on the back of this form.

## SECTION A: DEFAULT MEMBER SWITCHING TO PICK & MIX

Please select below the percentage of your and your Employer's future contributions which you wish to invest in each fund.

Please also confirm the percentage of your existing Retirement Account which you wish to invest in each fund. If you wish to leave your existing Retirement Account invested in its current funds then please tick here  and do not complete the last column of the table.

Fund name	% of your future contributions	% of your existing Retirement Account
FuturePlanner Long-Term Growth Fund		
FuturePlanner Stable Growth Fund		
FuturePlanner Cautious Growth Fund		
FuturePlanner Global Equity Fund		
FuturePlanner Corporate Bond Fund		
FuturePlanner Fixed Annuity Protection Fund		
FuturePlanner Inflation-Linked Annuity Protection Fund		
FuturePlanner Cash Fund		
<b>Total</b>	<b>100%</b>	<b>100%</b>

## SECTION B: PICK & MIX MEMBER CHANGING PICK & MIX OPTIONS

Please select below the percentage of your and your Employer's future contributions which you wish to invest in each fund.

Please also confirm the percentage of your existing Retirement Account which you wish to invest in each fund. If you wish to leave your existing Retirement Account invested in its current funds then please tick here  and do not complete the last column of the table.

Fund name	% of your future contributions	% of your existing Retirement Account
FuturePlanner Long-Term Growth Fund		
FuturePlanner Stable Growth Fund		
FuturePlanner Cautious Growth Fund		
FuturePlanner Global Equity Fund		
FuturePlanner Corporate Bond Fund		
FuturePlanner Fixed Annuity Protection Fund		
FuturePlanner Inflation-Linked Annuity Protection Fund		
FuturePlanner Cash Fund		
<b>Total</b>	<b>100%</b>	<b>100%</b>

## SECTION C: PICK & MIX MEMBER SWITCHING TO DEFAULT

Both your future contributions and existing fund will be invested in accordance with the Default strategy. Please insert your Target Retirement Age. If you do not make a choice, we will assume that you will retire at your State Pension Age (or 65 if later). The earliest permissible age is 55.

Target Retirement Age

Please sign and date below to confirm your investment instructions.

Signature

Date

**Please return this form to:** Leonardo FuturePlanner, XPS Administration, Albion, Fishponds Road, Wokingham, Berkshire RG41 2QE

FuturePlanner Hotline: 0118 467 5900

FuturePlanner Mailbox: FuturePlanner@xpsgroup.co.uk