FUTUREPLANNER

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**) 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 Self Select, please complete Section A of this form. If you switch out of the Default lifestyle strategy, your existing funds will become Self Select funds. This means your Retirement Account will remain invested in the same funds and in the same proportions as they are now, unless you choose to redirect your investments into different funds. If you become a Self Select investor, please note that your Retirement Account will not be switched in accordance with the Default lifestyle process as you approach retirement.
- ☐ If you are a Self Select member who wants to change your future or existing Self Select options, please complete Section B of this form.
- ☐ If you are a Self Select member who wants to switch to the 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** and visit 'My Account'. If you need help completing this form, please contact XPS using the details on the back of this form.

SECTION A: DEFAULT MEMBER SWITCHING TO SELF SELECT

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 ESG Fund		
FuturePlanner Islamic Global Equity Fund		
FuturePlanner Corporate Bond Fund		
FuturePlanner Fixed Annuity Focus Fund		
FuturePlanner Inflation-Linked Annuity Focus Fund		
FuturePlanner Cash Fund		
Total	**100%**	**100%**

LEONARDO

SECTION B: SELF SELECT MEMBER CHANGING SELF SELECT 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 ESG Fund		
FuturePlanner Islamic Global Equity Fund		
FuturePlanner Corporate Bond Fund		
FuturePlanner Fixed Annuity Focus Fund		
FuturePlanner Inflation-Linked Annuity Focus Fund		
FuturePlanner Cash Fund		
Total	**100%**	**100%**

SECTION C: SELF SELECT 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. The earliest permissible age is currently 55, and this will increase to 57 from April 2028.

Target Retirement Age

Please sign and date below to confirm your investment instructions.

Signature

Date D D M M Y Y

Please return this form to: Leonardo FuturePlanner, XPS Administration, Queen's Quay, 33-35 Queen Square, Bristol BS1 4LU

FuturePlanner Hotline: 0118 467 5900

FuturePlanner Mailbox: FuturePlanner@xpsgroup.com