

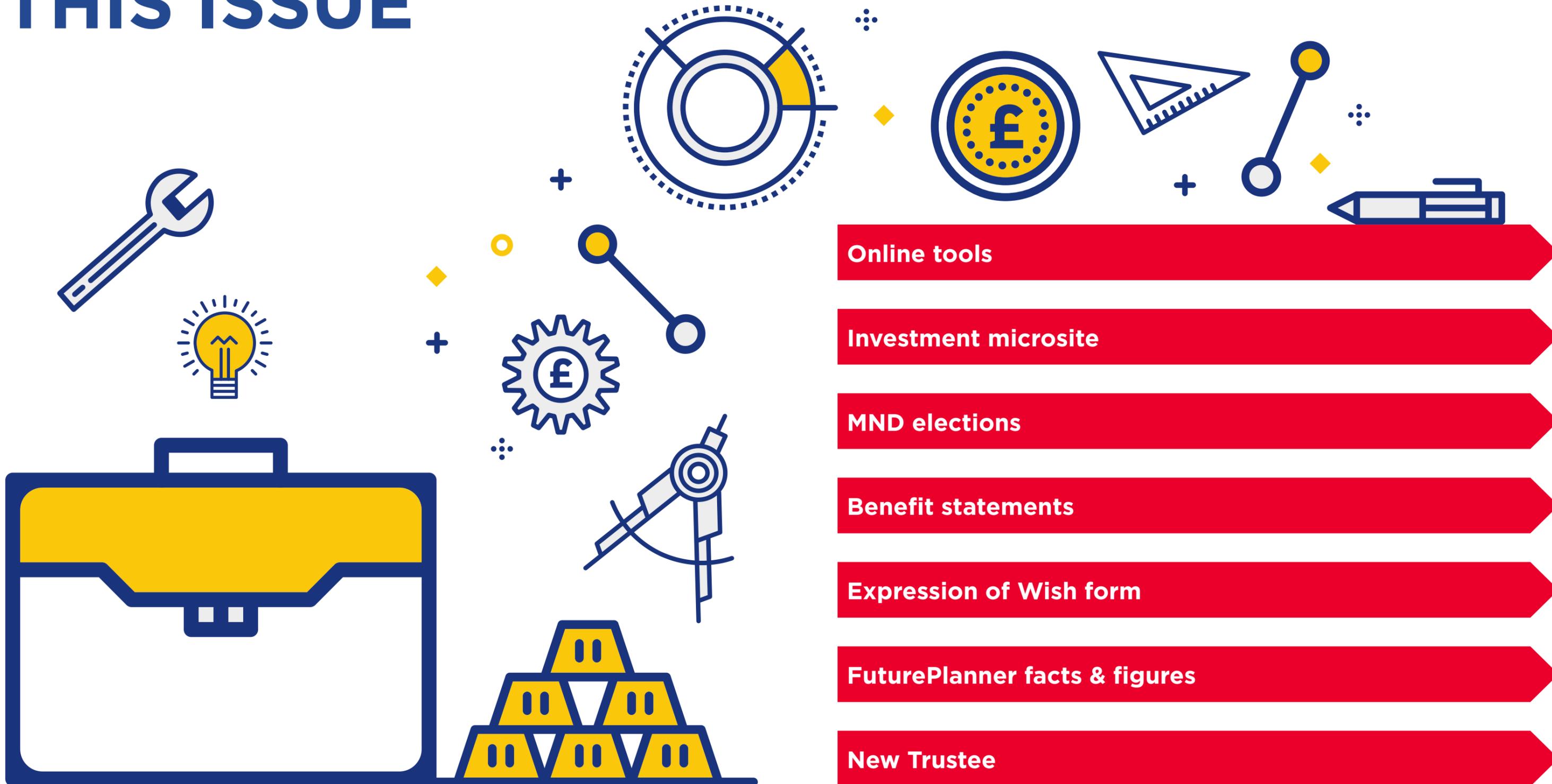
# INFORM

## WELCOME

WELCOME TO THE LATEST UPDATE FROM FUTURE**PLANNER**, THE AWARD-WINNING PENSION PLAN FOR LEONARDO EMPLOYEES.



# INSIDE THIS ISSUE



Online tools

Investment microsite

MND elections

Benefit statements

Expression of Wish form

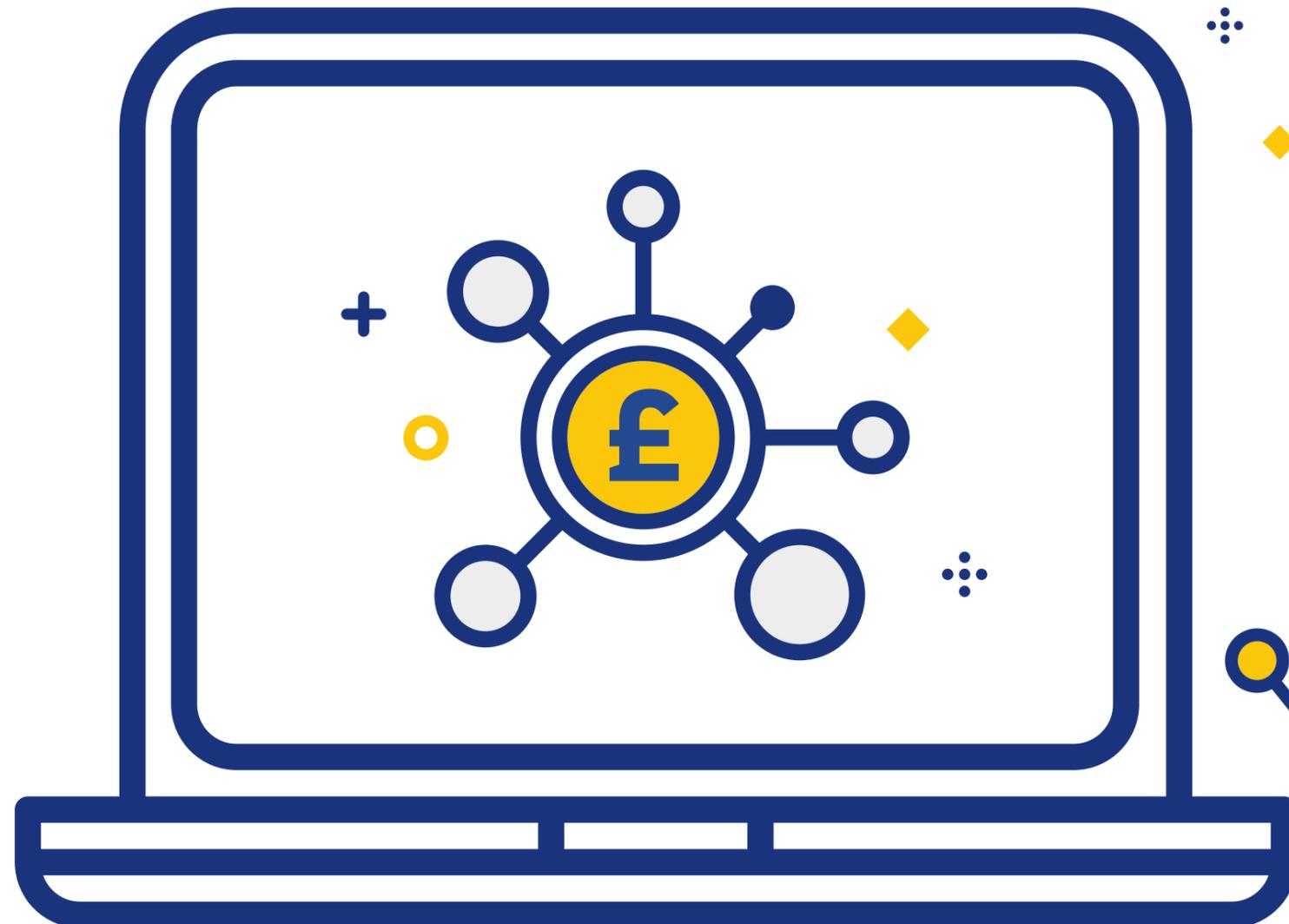
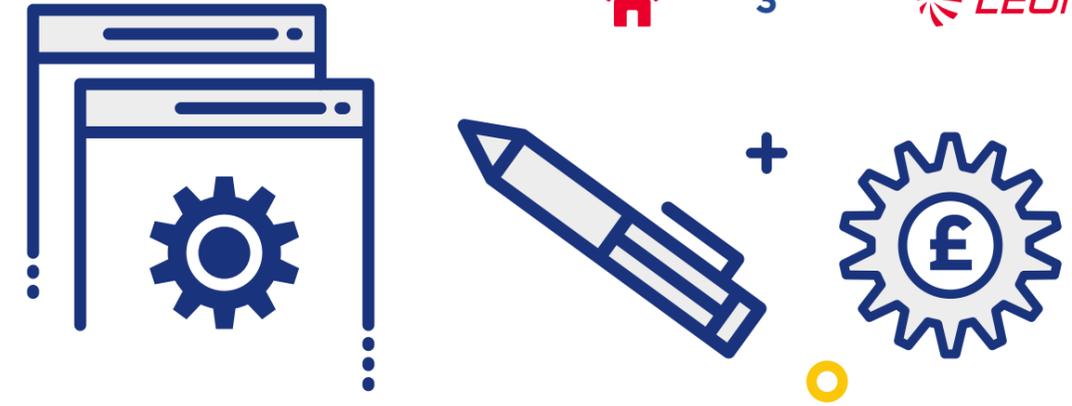
FuturePlanner facts & figures

New Trustee

# ONLINE TOOLS

## PENSION INFORMATION AT THE CLICK OF A BUTTON

The online tools within your personal pension account are a great source of instant pension information. You can use the online pension modeller to run illustrations of what your pot could be worth and how it can be used at retirement.



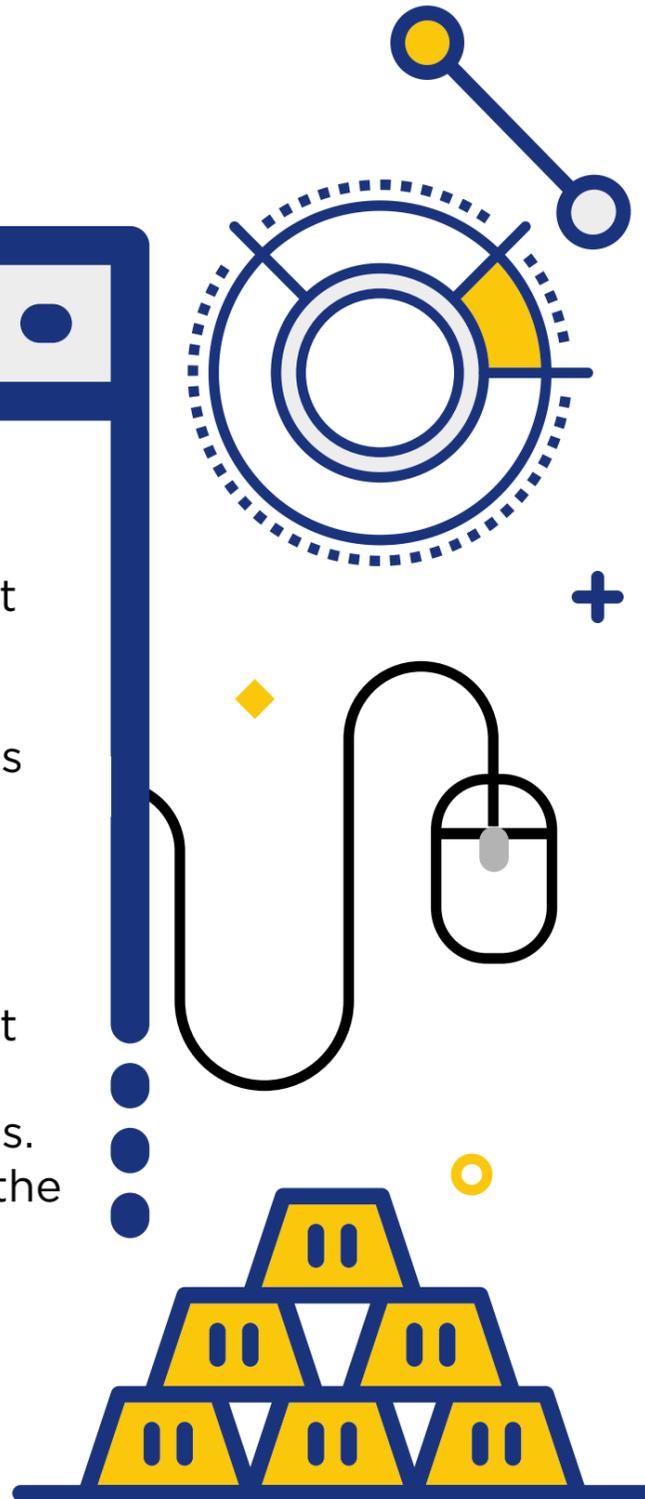
- In addition to the pension modeller, you can also:**
- View and update your personal details (e.g. address, email address, phone number)
  - View your salary and service history
  - View your benefit statements
  - Change your contributions
  - Change your investment strategy
  - Update your Expression of Wish form
  - Access fund information including unit prices and factsheets

Your online account can be accessed [here](#)



# NEW INVESTMENT MICROSITE

We are pleased to announce the launch of a new online pensions tool: the Leonardo DC investment microsite provided by Mobius Life. The new microsite allows FuturePlanner members to access current data on all Leonardo investment funds, including unit prices, historic performance and asset allocation. It also includes functionality to compare different funds to help you when deciding how you wish to invest your funds. To access the microsite, log into the 'My investments' section of your online **account** and click on the 'Compare Funds' tab.

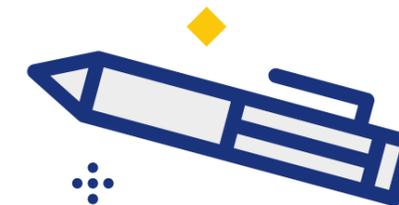


## NEW ISLAMIC GLOBAL EQUITY FUND OPTION

We have introduced an Islamic Global Equity Fund to the 'pick & mix' range of investment choices, which complies with the principles of Sharia law.



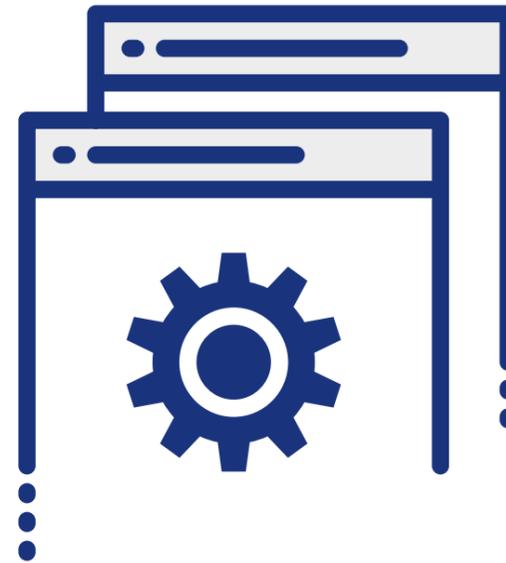
The Fund aims to track as closely as possible the performance of the Dow Jones Islamic Market Titans 100 Index.



Further information about this fund can be found in the factsheet in the new DC investment microsite. Our 'pick & mix' funds are intended for those who are comfortable managing their own investment strategy. Members who don't want to be actively involved in day-to-day investment decisions can continue to use the default lifestyle strategy.

# COULD YOU BE A MEMBER-NOMINATED TRUSTEE?

**THE TRUSTEE COMPANY WHICH RUNS FUTUREPLANNER CURRENTLY HAS EIGHT TRUSTEE DIRECTORS.**

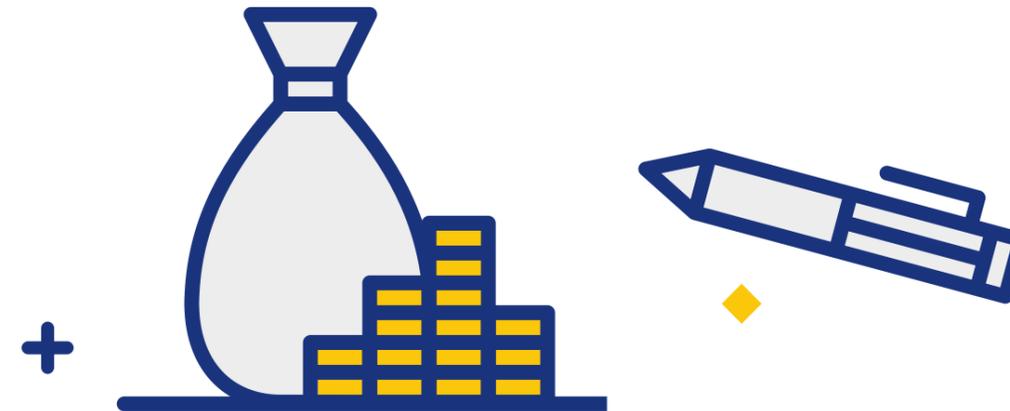


They are ordinary people like you, not necessarily with any particular expertise in pensions or investments but with a desire to help our members achieve the best retirement they can. Four of the eight Trustee Directors are appointed by the active members of FuturePlanner.

We currently have three positions available: two positions are due to current terms expiring and the other is a mid-term vacancy.

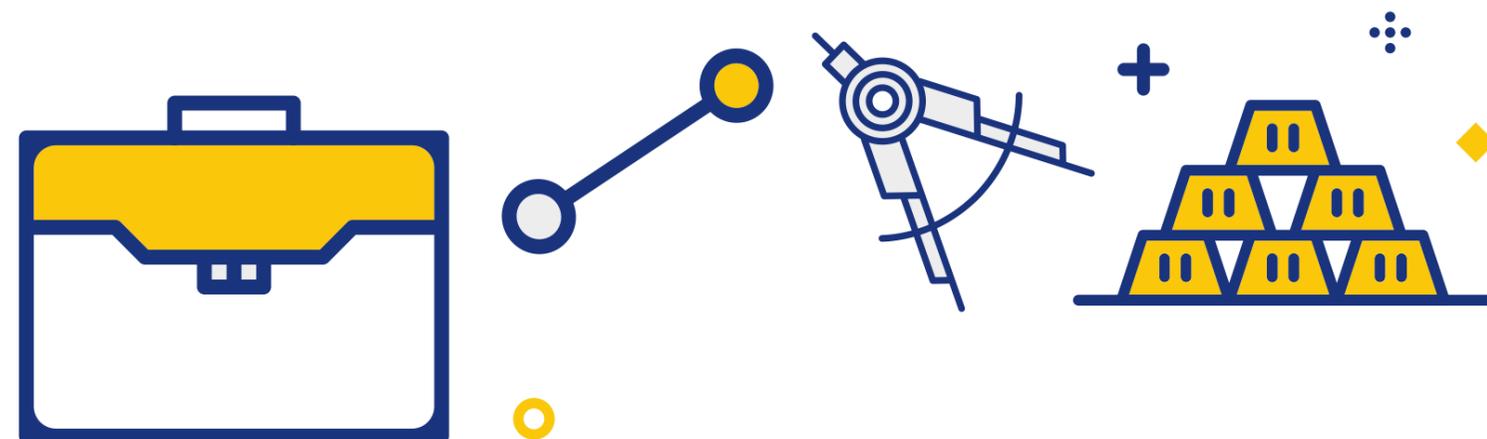
We are expecting two of the current incumbents to apply for a further term of office but we will need at least one new Trustee Director.

So, would you like to take on the challenge of running a multi-million-pound pension plan?



**HOW TO APPLY**  
 If you'd like to put yourself forward to become a Member-Nominated Trustee Director, please complete an application form and return it to the Trustee by Friday 17 December 2021. If you have any questions or would like a copy of the application form, please contact **Louise Dale**.

**KEY INFORMATION**  
**Role:** Member-Nominated Trustee Director for six years  
**Who can apply?** Any active member of FuturePlanner  
**Number of vacancies:** Three  
**To apply:** Complete the application form by Friday 17 December 2021.



# BENEFIT STATEMENTS ONLINE

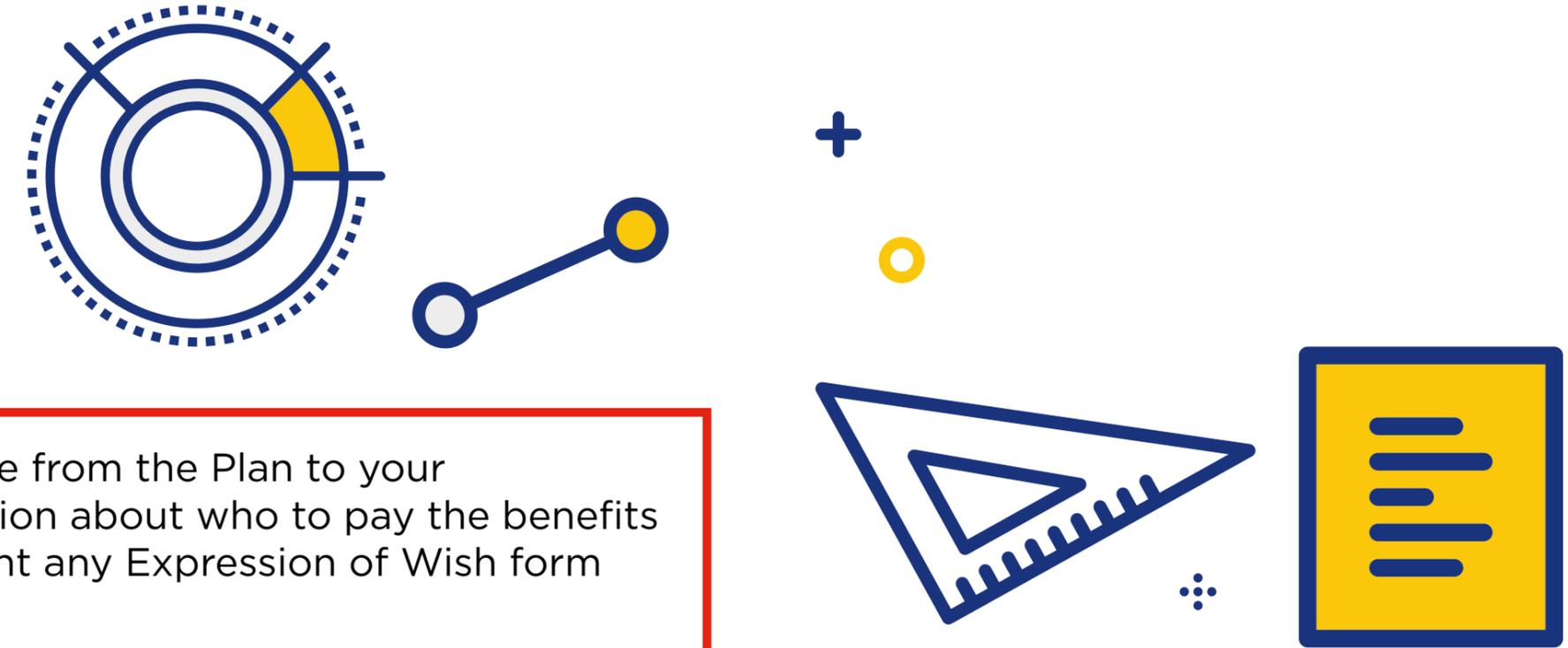
You were recently notified that your annual benefit statement for the 2020/2021 tax year is available online. This shows the contributions paid by you and the Company during the year and a forecast of what your pot might be worth at your Target Retirement Age.



Your statement shows your details up to 5 April, but you can find the most up-to-date values online at **mypension.com**. If you haven't logged in before, you have been sent a reminder of your login details in October.

# EXPRESSION OF WISH FORM

## WHEN DID YOU LAST UPDATE IT?

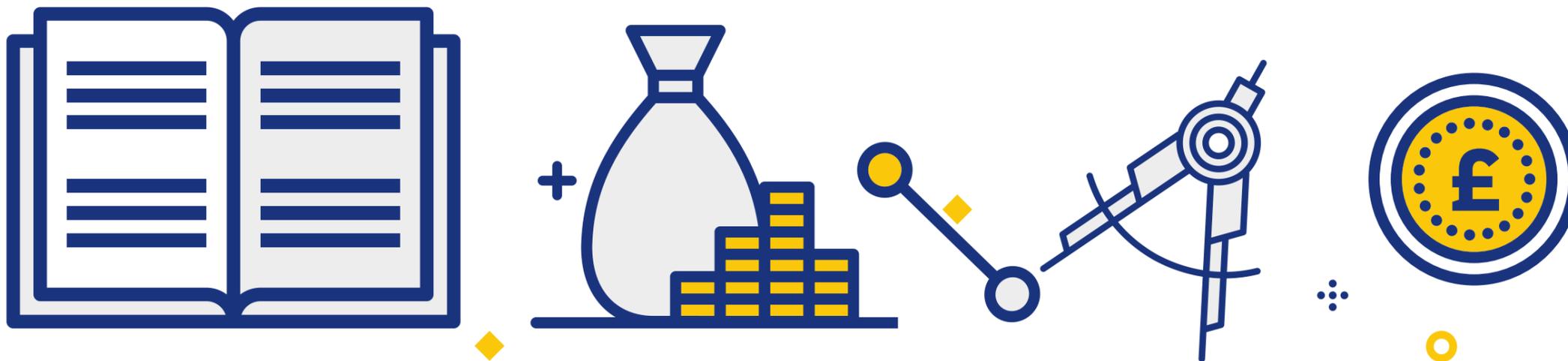


In the event of your death, a benefit may be payable from the Plan to your beneficiaries. The Trustee will need to make a decision about who to pay the benefits to and, whilst not binding, they will take into account any Expression of Wish form you have completed.

Where an Expression of Wish form has been completed recently, it gives a clear indication of your intention, and it is therefore important that you review and update your wishes regularly. **It is advisable to complete an updated Expression of Wish, even where the person(s) you are nominating are not changing.** This reconfirms your decision, making it easier for the Trustee to determine what your wishes would be.

It is particularly important to update an Expression of Wish if you have had significant changes in your life, such as having a child or a change in your relationship status or family circumstances.

The easiest way to update your Expression of Wish is online at **My Account**. Alternatively, you can download the **form**.



# FUTUREPLANNER FACTS & FIGURES

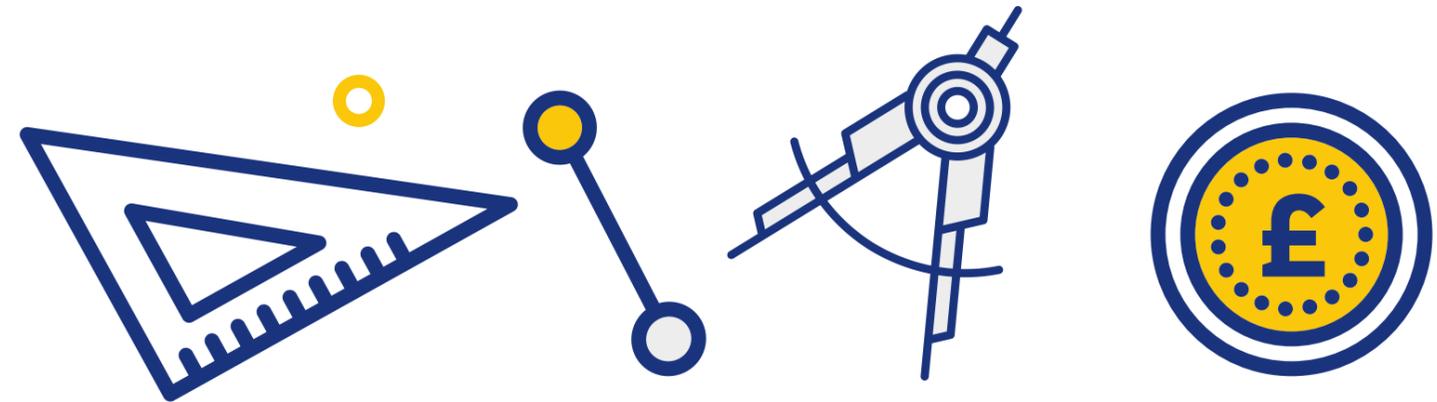
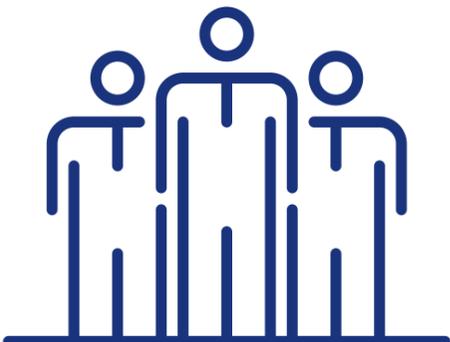
**FUTUREPLANNER CONTINUES TO GROW.**



It now has nearly 5,800 members with assets over £200 million.

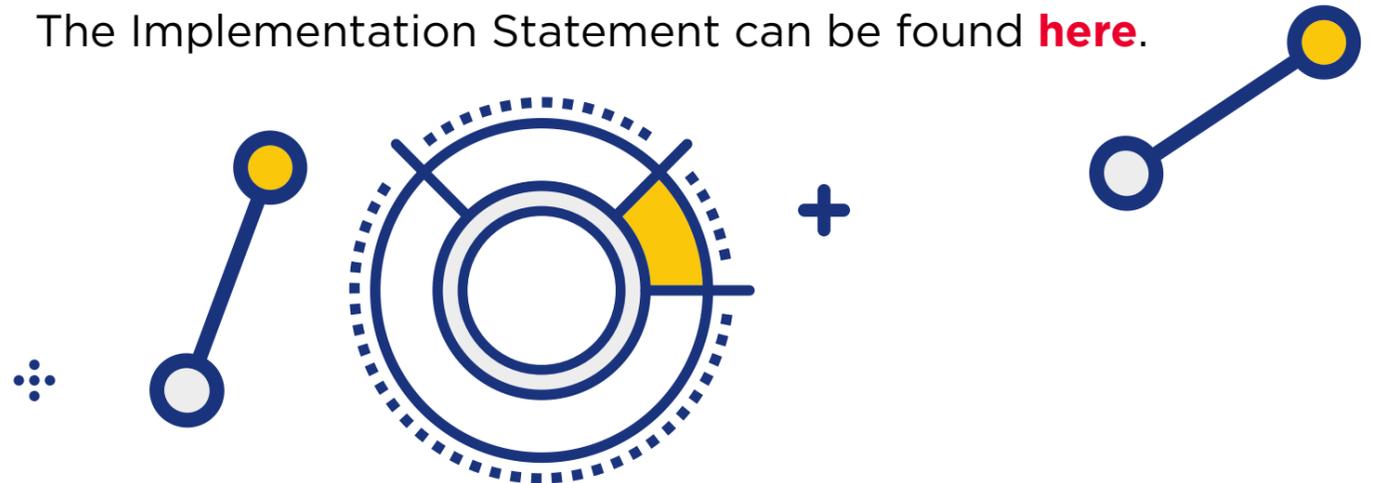
During the last financial year, we welcomed 749 new members into the Plan.

FuturePlanner is now Leonardo's largest pension scheme in terms of active members. Our 2021 annual report is available [here](#).



Every year the Trustee produces a Chair's Statement, which lets you know how the Plan is governed. It also includes information about the costs and charges relating to your investments in the Plan, to help you understand how they could affect the final value of your fund at retirement. The latest Chair's Statement can be found [here](#).

In 2021, the Trustee also produced its first Implementation Statement which documents how the Trustee has complied with its Statement of Investment Principles (SIP) during the year. The SIP sets out the approach the Trustee takes to governing the investment strategy, including the approach taken to Environmental, Social and Governance factors. The Implementation Statement can be found [here](#).



# NEW TRUSTEE



We welcome Craig Drysdale as a Company-Nominated Trustee Director (CND). Craig's day-to-day role is as Head of HR, Luton Site, Leonardo Electronics.

We wish to thank outgoing Trustees, Wendy Allen, Robert Sawford and Oliver Grammer for their contribution to managing the Plan.

