



Investment alteration request

Please use black ink and write in CAPITAL LETTERS or tick as appropriate.

Any corrections must be initialled. Please do not use correction fluid as this will invalidate your application.

About this form

This form can be used to

- change your investment fund selection
- add or cancel the Lifestyle Option.
- Please read the key features document as this will provide you with important information regarding the key risks and benefits of the product to help you make a decision.

Please also read the guide to fund options as this will provide you with full details of the funds available, their objectives, Prudential's Risk rating of these funds and charges to help you select the funds suitable for your needs.

Please read the important notes below before you start to complete this form.

Part 1 – Important notes

1. The funds available for the Prudential Company Pension Transfer Plan Investment are:

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| Prudential With-Profits Fund | Prudential International Equity Fund | Baillie Gifford UK Equity Fund* |
| Prudential Cash Fund | Prudential Long Term Growth Fund | Newton Higher Income Fund* |
| Prudential Pre-Retirement Fund | BlackRock Aquila (60:40) Global Equity Index Fund* | Newton Income Fund* |
| Prudential Fixed Interest Fund | BlackRock Ascent Overseas Equity Fund* | Prudential Socially Responsible Fund |
| Prudential Index-Linked Passive Fund | Baillie Gifford Overseas Equity Fund* | Prudential UK Smaller Companies Fund |
| Prudential Index-Linked Fund | Newton International Growth Fund* | BlackRock Ascent Pacific Rim Equity Fund* |
| Prudential Retirement Protection Fund | Prudential Global Equity Fund | Prudential North America Equity Passive Fund |
| Prudential International Bond Fund | BlackRock Ascent US Equity Fund* | Prudential Japan Equity Passive Fund |
| Prudential Corporate Bond Fund | BlackRock Ascent European Equity Fund* | Prudential Europe Equity Passive Fund |
| Prudential Long Dated Corporate Bond Fund | Prudential Equity Fund | Prudential Pacific Basin (Ex Japan) Equity Passive Fund |
| Prudential Discretionary Fund | Prudential UK Specialist Equity Fund | Aberdeen Life Balanced Fund* |
| Prudential Property Fund | BlackRock Aquila UK Equity Index Fund* | Aberdeen Life North American Equity Fund* |
| Prudential Overseas Equity Fund | BlackRock Ascent Japanese Equity Fund* | Aberdeen Life UK Equity Fund* |
| Prudential Overseas Equity Passive Fund | | |
| BlackRock Ascent Global Equity 50/50 Fund* | | |

* These funds are Prudential funds that are managed on our behalf by the fund management group stated. They should not be confused with the same or similar named funds or unit trusts offered independently by these fund management groups.

For more information on the funds available, please refer to A Guide to Fund Options.

Part 1 – Important notes – continued

2. You can choose to have investments in a maximum of 20 funds (19 if your plan includes compulsory investments in the With-Profits Fund due to Guaranteed Minimum Pension (GMP)) unless the Lifestyle Option applies.
3. Once an investment switch has been processed it cannot be cancelled.
4. Re-allocation of existing investments to the With-Profits Fund is not allowed if you are within three years of your Normal Retirement Date and, if chosen, will instead be invested in the Cash Fund.
5. GMP value must be invested in the With-Profits Fund if this was required when the plan was set up.
6. The Lifestyle Option does not apply to With-Profits investments.
7. If you take money out of the With-Profits Fund, we may make an adjustment to your fund value if the value of the underlying assets is less than the value of your plan including all bonuses. This adjustment is known as a Market Value Reduction (MVR). It is designed to protect investors who are not taking their money out and its application means that you get a return based on the earnings of the With-Profits Fund over the period your payments have been invested. We apply the MVR to your plan value including regular and final bonuses. We do not apply an MVR at your Normal Retirement Date, or in the month leading up to your Normal Retirement Date, or on any claims due to death.

Part 2 – Investor's details

Investor

Plan number

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National Insurance number

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If you have more than one Prudential Company Pension Transfer Plan, do you want this request to apply to all of your Company Pension Transfer Plans?

Yes

No

If No, this request will be applied only for the plan number you completed above.

I request the revised investment strategy as detailed in this form.

Part 5 – Lifestyle Options

If you want to add or cancel the Lifestyle Option, please complete this section, otherwise ignore this section.

These options do not apply to With-Profits investments.

Do you want to add/cancel the Lifestyle Option?

Add
Cancel tick only one box

For more information on the Lifestyle Option, please refer to A Guide to Fund Options.

How we use your personal data

For a copy of your data protection notice please refer to your original application form. If you have any questions about this please write to:

The Information Risk and Privacy Department, The Prudential Assurance Company Ltd, 3 Sheldon Square, London, W2 6PR.

For certain products we will need to process sensitive personal data such as health data. By signing and returning this form, you consent to us processing your sensitive data.

Prudential Assurance Company Limited is part of the Prudential group of companies which at the time of printing includes Prudential UK & Europe, the M&G Investments Group, Prudential Corporation Asia, Jackson National Life, and PPM America Inc (indirect wholly owned subsidiary).

For your own benefit and protection, you should read carefully the documentation provided before signing this form. You should also read carefully any further documentation provided to you in the future. If there is anything you do not understand, please ask us for further information.

Signature of investor

Date

Prudential use only

Reference

Date

CHWP



www.pru.co.uk

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