



Investment alteration form

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.

Please read the Notes on page 6 first.

About this form

This form can be used to:

- alter investment strategy (existing funds and/or future contributions)
- select a Lifestyle Option
- change income disinvestment funds for Income Drawdown Plans

Personal Pensions – section A and B, C and D as appropriate.

Income Drawdown – section A and E, F and G as appropriate.

If you wish to select the Self-Invested Fund (SIF) for the first time please complete our SIPP activation form (PENF6660). Once your SIPP account is set up you can use this form to make further investment alterations between your SIF and Pru insurance funds.

If you wish to make any changes to non Flexible Retirement Plans, please complete Investment Alteration Form P995.

Part A – Investor's details

Investor

Plan Number

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National Insurance Number

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If this request is to apply to all your personal pension plans please tick this box. (If your request cannot be applied to all your plans we will contact you).

If this request is to apply to all your income drawdown plans please tick this box. (If your request cannot be applied to all your plans we will contact you).

If this request is to apply to specific plans please list the plan numbers in the boxes below

I request Prudential to carry out the instructions as detailed in this form.

If I have chosen to invest in any of the PruFund funds and all my Pru Flexible Retirement Plans were taken out prior to 13 June 2011 I confirm that:

- I have read the notes on page 7 about PruFund and the additional documents mentioned in these notes
- I am fully aware of the features of these funds and agree to be bound by the updated terms and conditions.

Signature

X

Date

D	D	M	M	Y	Y	Y	Y
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Part B – Target Investment Strategy – Personal Pensions only

The maximum number of funds you can invest in is normally 20. Certain Fund options (e.g. Safeguard and each PruFund fund) count as two fund choices.

Fractions of 1% should not be used.

The guarantee term options available are shown in the document "The PruFund Range of Funds: Guarantee Options" – INVS11470. You can get a copy from your adviser or from pru.co.uk

You can select the guarantee to match the date you reach your Selected Retirement Age (SRA), provided your SRA is within the minimum and maximum guarantee terms available.

If the guarantee term selected ends less than 12 months before the date you reach your SRA, the Guarantee Date will always be set to the date of your SRA except where you have selected the maximum guarantee term available.

Complete this section to specify the target percentage in each investment fund selected. We will calculate the percentage of units to be cancelled to meet your Target Investment Strategy.

Do **NOT** complete this section if you want to specify your exact requirements on the percentage(s) of existing investments to be cancelled – instead complete the Detailed Fund Selection in Section C.

Target Investment Strategy

Fund	Target %
Total	100%

Do you want to alter?

Investment of both existing and future contributions?

Existing investments only?

Investment of future contributions only?

Is the guarantee term you wish to select currently available?

No – You must select from the guarantee terms currently available.

Yes – Tick this box if you want the guarantee to apply at SRA

Tick this box if you want the guarantee to apply at the end of the guarantee term

Please select your chosen guarantee term from the options available years

If Section B is completed, please do not complete Section C.

Part C – Detailed Fund Selection – Personal Pensions only (continued)

Is the guarantee term you wish to select currently available?

No – You must select from the guarantee terms currently available.

Yes – Tick this box if you want the guarantee to apply at SRA

Tick this box if you want the guarantee to apply at the end of the guarantee term

Please select your chosen guarantee term from the options available

 years

Part D – Lifestyle Option – Personal Pensions only

Full details of this option are covered in your Technical Guide. If this option is selected it will not apply to investments in With-Profits, a PruFund Protected Fund or Self-Invested Funds.

If this option is selected by ticking the box below, any future automatic switches may not start until after the selection has been confirmed.

Personal Pension Lifestyle Option

Part E – Lifestyle Investment Options – Income Drawdown plans only

Full details of these options are in your Technical Guide.

If one of these options is selected by ticking the box below, any future automatic switches may not start until after the selection has been confirmed.

If you choose one of these Lifestyle options and currently have PruFund investments, all switches to achieve this option will be made 28 days after the date we receive this form.

Drawdown Lifestyle Investment (Cautious)

Drawdown Lifestyle Investment (Balanced)

Drawdown Lifestyle Investment (Adventurous)

If you have chosen one of these options do not complete sections F and G.

The guarantee term options available are shown in the document "The PruFund Range of Funds: Guarantee Options" – INVS11470. You can get a copy from your adviser or from pru.co.uk

You can select the guarantee to match the date you reach your Selected Retirement Age (SRA), provided your SRA is within the minimum and maximum guarantee terms available.

If the guarantee term selected ends less than 12 months before the date you reach your SRA, the Guarantee Date will always be set to the date of your SRA except where you have selected the maximum guarantee term available.

To invest in one of these three Lifestyle options there should normally be an outstanding term of at least 5 years.

Part F – Target Investment Strategy – Income Drawdown Plans only

The maximum number of funds you can invest in is normally 20. Certain Fund options (e.g. Safeguard and each PruFund fund) count as two policies.

Fractions of 1% should not be used.

The guarantee term options available are shown in the document "The PruFund Range of Funds: Guarantee Options" – INVS11470. You can get a copy from your adviser or from pru.co.uk

You can select the guarantee to match the date you reach age 75, provided you will reach age 75 within the minimum and maximum guarantee terms available.

If the guarantee term selected ends less than 12 months before the date you reach age 75, the Guarantee Date will always be set to the date you reach age 75 except where you have selected the maximum guarantee term available.

Complete this section to specify the target percentage in each investment fund selected. We will calculate the percentage of units to be cancelled to meet your Target Investment Strategy.

Do **NOT** complete this section if you want to specify your exact requirements on the percentage(s) of existing investments to be cancelled – instead complete the Detailed Fund Selection in Section G.

Target Investment Strategy

Fund	Target %
Total	100%

Is the guarantee term you wish to select currently available?

No – You must select from the guarantee terms currently available.

Yes – Tick this box if you want the guarantee to apply at age 75

Tick this box if you want the guarantee to apply at the end of the guarantee term

Please select your chosen guarantee term from the options available

years

If section F is completed do not complete section G.

All of the funds are described in detail in our Fund Description Brochures.

95% Safeguard	IM Verbatim Portfolio 5 Growth	M&G High Yield Corporate Bond
Aberdeen Emerging Markets	IM Verbatim Portfolio 6	M&G Managed Growth
Adventurous Portfolio	IM Verbatim Portfolio 7	M&G Recovery
Allianz RCM BRIC Stars	Ignis Cartesian UK Opportunities	M&G Strategic Corporate Bond
Artemis Capital	International	M&G UK Growth
Artemis European Growth	Invesco Perpetual Corporate Bond	M&G UK Select
Artemis Global Growth	Invesco Perpetual Distribution	Neptune Balanced
Artemis High Income	Invesco Perpetual Global Bond	Neptune Global Alpha
Artemis Income	Invesco Perpetual High Income	Neptune Global Equity
Artemis Strategic Bond	Invesco Perpetual Income	Neptune Income
Artemis UK Growth	Invesco Perpetual Japanese	New Star International Property
Artemis UK Smaller Companies	Smaller Companies	Newton Balanced
Artemis UK Special Situations	Invesco Perpetual Managed	Newton Global Higher Income
Aviva Property Trust	Invesco Perpetual Monthly	Newton International Bond
AXA Framlington Equity Income	Income Plus	Newton Higher Income
AXA Framlington Health	Investec American	Newton International Growth
AXA Framlington UK Select Opps	Investec Capital Accumulator	Newton Managed
Baillie Gifford High Yield Bond	Investec Cautious Managed	Newton Managed (OEIC)
Balanced Portfolio	Investec Global Energy	North American
BlackRock Gold & General	Investec Global Free Enterprise	Old Mutual Corporate Bond
BlackRock UK	Investec Strategic Bond	Old Mutual Japanese Select
BlackRock UK Absolute Alpha	Japanese	Old Mutual UK Select Mid Cap
BlackRock UK Smaller Companies	J P Morgan Cautious Total Return	Pacific Markets
BlackRock UK Special Situations	J P Morgan Europe Dynamic (ex UK)	Property
Cash	J P Morgan Europe Smaller Companies	PruFund 0-30
Cautious Growth Portfolio	J P Morgan Natural Resources	PruFund 10-40
Cautious Managed Growth	Jupiter Emerging European	PruFund 20-55
Cautious Portfolio	Opportunities	PruFund 40-80
Cazenove UK Growth & Income	Jupiter European Special Situations	PruFund Cautious Fund
CIS Sustainable Leaders	Jupiter Financial Opportunities	PruFund Growth Fund
Corporate Bond	Jupiter High Income	Prufund Protected Growth Fund
Defensive Portfolio	Jupiter Income	PruFund Protected Cautious Fund
Ethical	Jupiter Merlin Balanced Portfolio	Psigma Income
Equity	Jupiter Merlin Growth Portfolio	Schroder Gilt & Fixed Interest
European	Jupiter Merlin Income Portfolio	Schroder Global Property Securities
Fidelity European	Jupiter Merlin Worldwide Portfolio	Schroder Income
Fidelity Moneybuilder Income	Jupiter UK Growth	Schroder Tokyo
Fidelity South East Asia	Kames Ethical Equity	Schroder UK Alpha Plus
First State Asia Pacific Leaders	Kames High Yield Bond	Schroder UK Mid 250
First State Global Emerging Market	Kames Investment Grade Bond	Schroder UK Smaller Companies
Leaders	Kames Strategic Bond	Schroder US Mid Cap
Fixed Interest	Kames UK Opportunities	Self Invested Fund
GLG Japan Core Alpha	Legg Mason US Smaller Companies	Small Companies
Henderson Cautious Managed	Managed	Standard Life Global Absolute
Henderson China Opportunities	Managed Defensive	Return Strategies
Henderson Emerging Markets	Managed Distribution	SWIP Multi Manager Diversity
Opportunities	Martin Currie Asia Pacific	SWIP Multi Manager Select Boutiques
Henderson European Growth	Martin Currie Japan	Thames River Balanced Managed
Henderson European Selected	Martin Currie North American	Thames River Global Boutiques
Opportunities	M&G American	Threadneedle American
Henderson High Yield Monthly Income	M&G Corporate Bond	Threadneedle American Select
Henderson Preference & Bond	M&G Dividend	Threadneedle Global Bond
IM Verbatim Portfolio 3	M&G Gilt & Fixed Interest Income	UK Equity & Bond
IM Verbatim Portfolio 4	M&G Global Basics	With Profits
IM Verbatim Portfolio 5 Inc	M&G Global Leaders	

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