



Request 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.

About this form

For use with Premier Company pension plans, Executive Pension Plans (EPP), MaxiPension Plus, MaxiPension, OmniPension Plus, OmniPension.

This form can also be used with the following M&G* plans:

Executive Pension Plan, Legacy Executive Pension Plan, Executive Retirement Account, Company Pension Plan and the PAXUS and Legacy AVC plans.

This form can be used to:

- alter investment strategy (existing funds and/or future contributions)
- select the Pension Protector option and, for Series A and Premier plans, the Lifetime Investment option.

Please complete in **CAPITAL** letters, using black ink, and tick the required answer where an option is given. Please read the notes on page 3 first.

* Plans which were taken out with M&G Pensions & Annuity Company

Part A – Scheme and member details

Scheme Name

Scheme or Plan Number

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

Signed for and on behalf of the Trustees

Date

Ignore the rest of this section unless the plan to be altered relates to an individual member or an individual plan.

Member (if applicable)

Plan Number

National Insurance Number

If this request is to apply to all the member's plans in this scheme please tick this box.

Note – If the box is not ticked this request will apply to the above plan only.

Application of Existing Investments

Fund	% of cash realised to be applied
Total	100%

Future Contributions

Fund	% contribution
Total	100%

Fractions of 1% should not be used.

There is a maximum number of funds which can be used for investment at any one time, normally six. Plans which were taken out with M&G Pensions and Annuity Company can invest in a maximum of 20 funds unless both Capital and Accumulation units apply, where the maximum is 10 funds.

Fractions of 1% should not be used.

Notes

- › Once an investment switch has been processed it cannot be cancelled.
- › Re-allocation of existing investments (or redirection of future contributions) to the With-Profits Fund is not allowed for members within three years of Normal Retirement Date and, if chosen, will instead be invested in the Cash fund. Please remember that the value of the cash fund can fluctuate depending on the value of the underlying assets.
- › Any Switching Charges will be deducted before application of the cash.
- › The Fund Management Charge may not, in future, be taken in the way described in the plan booklet. However, the total Fund Management Charge taken will not be greater than the corresponding figure shown for the relevant fund in our table of Fund Management Charges. Details are available on request.
- › A Market Value Reduction may be applied to switches out of With-Profits. See your Key Features document for further details.
- › The value of your investment may fall as well as rise.

The funds available for investment for Premier and ex-Scottish Amicable plans are:

Cash	Equity	European
With-Profits	Property	Japanese
Fixed Interest	International	Pacific Markets
Global Balanced UK View#	North American	Small Companies
Managed	95% Safeguard##	

Not available for Premier Pensions Plans.

Only available for all Premier, Series A, MaxiPension Plus and OmniPension Plus plans.

The following funds are also available for Series A and Premier plans:

Newton Managed	Invesco Perpetual Income	Ethical
Invesco Perpetual Managed	Corporate Bond	Managed Distribution
Equity Income	M&G Corporate Bond	Newton Balanced
M&G Managed Growth	M&G Gilt & Fixed Interest Income	Newton International Growth
Cautious UK Managed	M&G High Yield Bond	FTSE 100 Tracker#
Newton Higher Income	Managed Defensive	

All of the investment funds are described in our Pensions – Legacy fund guide (PENB10290).

Not available – MaxiPension and Maxi Plus, OmniPension or Omni Plus.

The following funds are available for all ex-M&G* plans, except for the Managed Income Asset Management Plan (see below):

Pru (M&G) American Fund	Pru (M&G) Global Basics Fund	Pru (M&G) Property Fund
Pru (M&G) South East Asia Fund	Pru (M&G) Global Leaders Fund	Pru (M&G) Recovery Fund
Pru (M&G) UK Select	Pru (M&G) High Yield Corporate Bond Fund	Pru (M&G) UK Growth Fund
Pru (M&G) Corporate Bond Fund	Pru (M&G) International Fund	Pru (M&G) UK Income Fund
Pru (M&G) Cash Fund	Pru (M&G) Japan Fund	
Pru (M&G) Equity Fund	Pru (M&G) Managed Fund	
Pru (M&G) European Fund	Pru (M&G) Managed Income Fund	
Pru (M&G) Gilt & Fixed Interest Income Fund	Pru (M&G) PPP Fund	

Only Managed Income Asset Management plans can invest in the Managed Income Fund (Ex M&G). M&G* plans can invest in a maximum of 20 funds at any one time. However, if the plan has both Capital and Accumulation units, the maximum is 10 funds.

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