



# Investment Alteration 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

This form covers our Premier range and products originally taken out with Scottish Amicable and M&G# for **Personal Pension, Stakeholder, Group Personal Pension, Group Stakeholder, Free Standing AVC, Section 32 Buy-Out and investment linked Retirement Annuity Plans.**

This form can be used to

- alter investment strategy (existing funds and/or future contributions)
- select the Lifetime Investment Option for Series A and Premier plans
- select the Pension Protector Option (not available for M&G# plans)

**If you wish to make changes to any Pru Flexible Retirement Plans you have please complete Investment alteration Form FRPF10149.**

## Part 1 – Investor's details

Investor

Plan Number

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National Insurance Number

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

**If this request is to apply to all your pension plans within the range listed at the top of this form, please tick the box.**

(If your request cannot be applied to all your plans we will contact you).

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

Signature

Date

D	D	M	M	Y	Y	Y	Y
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# Plans originally taken out with M&G Pensions and Annuity Company.





## Part 4 – Lifetime Investment/Pension protector options

If you want these options please complete this section.

These options do not apply to any investments in the With-Profits Funds.

If one of these options is selected using this form, any future automatic switches may not start until after the addition has been confirmed by us.

Please tick only one option.

- |                                   |                          |   |  |
|-----------------------------------|--------------------------|---|--|
| Lifetime Investment (Cautious)    | <input type="checkbox"/> | } | The Lifetime Investment options apply only to contributions to Series A and Premier. |
| Lifetime Investment (Balanced)    | <input type="checkbox"/> |   |  |
| Lifetime Investment (Opportunity) | <input type="checkbox"/> |   |  |
| Pension Protector                 | <input type="checkbox"/> |   | Not available for M&G# plans.  |

## Notes

### General

Details of Pru funds can be found in our funds brochures available from your adviser or directly from us. See pages 5 & 6 for a list of available funds.

Protected Rights relate to funds built up in connection with contracted-out service.

Once an investment switch has been processed it cannot be cancelled.

Any switching charges will be deducted before application of the cash.

Switches out of With-Profits may incur a Market Value Reduction. This may have the effect of reducing your fund value. Please see your Key Features document for further information.

Re-allocation of existing investments (or redirection of future contributions) to the With-Profits Fund is not allowed within three years of your selected retirement age and, if chosen, will instead be invested in the Cash Fund. Please note that the value of the cash fund can fluctuate depending on the underlying assets.

Please remember the value of your investment may fall as well as rise.

# Plans originally taken out with M&G Pensions and Annuity Company.

The Management Charge for Pru funds may not, in the future, be taken in the way described in your plan booklet. However, the Management Charge taken will not be greater than the corresponding figure shown for the relevant fund in our table of Management Charges. Details are available on request.

### Section 32 Plans

The Guaranteed Minimum Pension (GMP) value must be invested in the With-Profits Fund.

### Premier Stakeholder/Group Stakeholder

The range of funds available will be restricted to those that can be provided within the Maximum Fund Management Charge of 1%.

## Notes – continued

The funds available for each product/plan type are shown with a "✓" below:  
All of the funds are described in detail in our Fund Description Brochures.

Fund	Series A/Premier Individual and Group Personal Pensions	Premier Section 32 Buy-Out/Free Standing AVC Series A	Other Ex-Scottish Amicable Plans
Artemis European Growth	✓		
AXA Framlington UK Select Opps	✓		
Cash	✓	✓	✓
Corporate Bond	✓	✓	
Equity	✓	✓	✓
Ethical	✓	✓	
European	✓	✓	✓
FT-SE 100 Tracker	✓ <sup>1</sup>	✓	
Fixed Interest	✓	✓	✓
International	✓	✓	✓
Invesco Perpetual Corporate Bond	✓		
Invesco Perpetual Income	✓	✓	
Invesco Perpetual Managed	✓	✓	
Japanese	✓	✓	✓
M&G American	✓		
M&G Corporate Bond	✓	✓	
M&G Dividend	✓	✓	
M&G Gilt & Fixed Interest Income	✓	✓	
M&G Global Basics	✓		
M&G Global Leaders	✓		
M&G Global Managed	✓ <sup>2</sup>	✓ <sup>2</sup>	✓
M&G High Yield Corporate Bond	✓	✓	
M&G Managed Growth	✓	✓	
M&G Recovery	✓		
M&G Strategic Corporate Bond	✓		
M&G UK Growth	✓		
M&G UK Select	✓		
Managed	✓	✓	✓
Managed Defensive	✓	✓	
Managed Distribution	✓	✓	
New Star European Growth	✓		
Newton Balanced	✓	✓	

Fund	Series A/Premier Individual and Group Personal Pensions	Premier Section 32 Buy-Out/Free Standing AVC Series A	Other Ex-Scottish Amicable Plans
Newton Higher Income	✓	✓	
Newton International Growth	✓	✓	
Newton Managed	✓	✓	
North American	✓	✓	✓
Pacific Markets	✓	✓	✓
Property	✓	✓	✓
Small Companies	✓	✓	✓
UK Equity and Bond	✓	✓	
With Profits	✓ <sup>3</sup>	✓	✓ <sup>3</sup>
95% Safeguard	✓	✓	✓ <sup>4</sup>

- 1 Not available for Individual Premier members joining after 17/1/2005
- 2 Not available for Premier Pension Plans
- 3 Not available for PRIP or Premier Stakeholder/Group Stakeholder
- 4 Only Flexipension (Series 7), Indepension (Series 5), Extrapension (Series 3)

The following funds are available for all Ex-M&G# plans, except for Personal Pensions (S226), Law Society and Managed Income Personal Pension Plans (see below):

# Plans originally taken out with M&G Pensions and Annuity Company.

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

\* Only Law Society and Personal Pension (S226) plans can invest in the Personal Pension Equity Fund (Ex M&G). If you switch out of this fund, you cannot switch back in at a later date.

Managed Income Personal Pension plans can only invest in the Managed Income Pension Fund (Ex M&G). This fund is not available for any other plans.

[www.pru.co.uk](http://www.pru.co.uk)