



# 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 a Lifetime Investment Profile\*

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

Please return this form to: **FREEPOST, Prudential, Lancing BN15 8GB**

\* Not available for plans originally taken out with M&G Pensions and Annuity Company.

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

## 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

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## Part 4 – Lifetime Investment Profiles

If you want one of these options please complete this section. Any automatic switching which takes place as part of these options may not start until after we have confirmed your chosen option has been added to your plan.

These options do not apply to any investments in the With-Profits funds and are not available for plans originally taken out with M&G Pensions and Annuity Company.

Please tick only one box.

Lifetime Investment Profile targeting **retirement options**

Lifetime Investment Profile targeting **an annuity**

Lifetime Investment Profile targeting **100% cash**

Lifetime Investment Profile targeting **drawdown**

## Notes

### General

Details of Prudential funds can be found in your fund guide available from your adviser or at [www.pru.co.uk/funds/guides](http://www.pru.co.uk/funds/guides)

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

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 or fund guide for more 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 remember that the value of the Cash Fund can fluctuate depending on the value of the underlying assets. It also has a guarantee that the price at which you can sell units in the fund – the bid value – will not fall.

The Management Charge for Prudential 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%.

Please remember that the value of your investment can go down as well as up and so you may not get back the amount you put in.

### How we use your personal information

For a copy of our latest Data Protection Notice, please visit [pru.co.uk/mydata](http://pru.co.uk/mydata). This details how and why we use your personal information (including any sensitive personal information), who we may share it with and your rights around your personal information. Alternatively, you can request a hard copy to be sent to you by writing to The Data Protection Officer, Customer Service Centre, Lancing BN15 8GB.

Please note that we collect personal information from you that is necessary for us to either provide you with the product or service you've requested or to comply with statutory or contractual requirements. Unfortunately if you don't provide all of the information we require this may mean we are unable to provide our products and services to you.

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

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