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| **Switching Investments**  Please use this form to tell us how you would like to change where the money you’ve already paid in is invested as well as your future contributions. |

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| **WHAT INVESTMENT CHANGES DO YOU WANT TO MAKE?** | **WHAT DO I FILL IN?** | **Tick ONE box only** |
| Change my Lifestyle Fund from the default option (please note existing and future contributions will automatically be changed): | **Complete only box (A) below** |  |
| Self-select how your existing money is invested and alter the fund choice for the contributions you pay in the future: | **Complete both boxes (B) & (C) below** |  |
| Self-select how your existing money is invested, leaving the fund choice for your future contributions as they are now: | **Complete only box**  **(B) below** |  |
| Self-select where your future contributions are invested, leaving your existing money where it is now: | **Complete only box**  **(C) overleaf** |  |

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| **(A)- SWITCH MY LIFESTYLE FUND EXISTING & FUTURE CONTRIBUTIONS** | | | |
| **NAME OF CURRENT LIFESTYLE FUND** | **100%**  **(tick one box only)** | **NAME OF NEW LIFESTYLE FUND** | **100%**  **(tick one box only)** |
| Retirement Planner 15 Year CASH Lifestyle |  | Retirement Planner 15 Year CASH Lifestyle |  |
| Retirement Planner 15 Year DRAWDOWN Lifestyle |  | Retirement Planner 15 Year DRAWDOWN Lifestyle |  |
| Retirement Planner 15 Year ANNUITY Lifestyle |  | Retirement Planner 15 Year ANNUITY Lifestyle |  |

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| 1. **– SELF-SELECT MY OWN FUNDS TO MOVE THE MONEY THAT I HAVE ALREADY PAID IN?** | | | | | | |
| **From**  **Name of current fund(s)** | **Percentage to be moved %** |  | **To**  **Name of new fund(s)** | **Fund code**  **(from your investment guide)** | | **New allocation %** |
|  |  |  |  | |  |
|  |  |  |  | |  |
|  |  |  |  | |  |
|  |  |  |  | | **100%** |
| **(C) – SELF-SELECT MY OWN FUNDS TO INVEST MY FUTURE CONTRIBUTIONS?** | | | | | | |
| **To – Name of fund(s)** | | | | **Fund code**  **(from your investment guide)** | **New allocation %** | |
|  | | | |  |  | |
|  | | | |  |  | |
|  | | | |  |  | |
| **Total** | | | |  | **100%** | |

**You should also consider whether the scheme retirement age of 65 is appropriate for your retirement plans.**

**To select an alternative retirement date please advise the pensions team by email (**[**pensions@wessexwater.co.uk**](mailto:pensions@wessexwater.co.uk)**).**

Full Name (in capitals)

Full Postal Address

(in capitals)

NI Number

Date of Birth

I hereby authorise Legal & General to move my existing money and/or move any amounts I pay

in the future including any one-off amounts in accordance with my instructions on this form.

Signed …...............................................................…….. Date..................................................

Full name …… .............................................................. Employee Number……………….….…

(capital letters)

**Please return this form to :**

Legal & General (L&G) (Portfolio Management Services) Limited Workplace Savings

2nd floor Knox Court

10 Fitzalan Place

Cardiff

CF24 0TL

You can also return the form to the Pensions Team to forward to L&G on your behalf:

Pensions Team, Wessex Water, Claverton Down, Bath, BA2 7WW.