

Switch and redirection

Fill in this form to instruct a switch of existing investment holdings or to tell us which funds you would like new contributions to be invested. You can either choose the specific funds you wish to invest in or a Lifestyle profile. For details of the full range of funds and Lifestyle profiles available please see your scheme's membership booklet, which is available on request.

Please see your membership booklet/fund booklet for details of:

- the charges for switching between funds, and
- the maximum number of switches allowed each year; and
- the maximum number of funds that you can invest in at any one time.

Switch and redirection instructions will normally be processed within two working days of being received and accepted. If the form is not completed to our satisfaction we will only accept your request once we have received either clarification, or the additional information that we need. When the switch takes place your funds will be out of the market while the switch is processed. Stock markets could rise or fall between the sale and purchase impacting the value of your investment. This could work in your favour or against you.

Once you have filled in this form, please return it to:

Premier
PO Box 108
BLYTH
NE24 9DY

Or email it to us at admin@premiercompanies.co.uk or fax it to us on 020 3014 8768.

Fill in this form using BLOCK CAPITALS and black ink. Mark all answers with an X.

Your details

Scheme name	<input type="text"/>	
Member reference	<input type="text"/>	
First name and surname	<input type="text"/>	<input type="text"/>
Date of birth	<input type="text"/>	
Home phone	<input type="text"/>	Mobile <input type="text"/>
Email address	<input type="text"/>	

Type of investment switch (select one option)

Lifestyle profile	<input type="checkbox"/>	Select a Lifestyle Profile (complete section 1).
Redirection only	<input type="checkbox"/>	Alter fund choice for future contributions only, leaving existing units unchanged (complete section 2).
Switch and redirection	<input type="checkbox"/>	Switch existing units and alter fund choices for future contributions (complete sections 2 and 3).
Switch only	<input type="checkbox"/>	Switch existing units only , leaving the fund choice for future contributions unchanged (complete section 3).

Lifestyle and future contributions

Section 1 - Lifestyle investment approach (default option)

Do you wish to invest using a lifestyle option?

Yes No (go to next section)

Do you wish to use the default lifestyle option?

Yes No (please state the name of the lifestyle strategy you wish to use).

What is your target retirement age (55 is the minimum)?

Target retirement age is used to decide how your funds are allocated across the different investment funds used in the lifestyle strategy. A default age of 65 will be used if you do not state your preferred target retirement age. You can change your target retirement age at a later date.



Do not complete this section if you are investing in a lifestyle strategy. Complete this section if you wish to change the fund allocation of your future contributions. This option is only available to members still actively contributing to the scheme.

If you are selecting your own funds under this option please write the name of your chosen fund(s) in full. Please write the percentage amounts of your investment choices next to your selected fund. Do not use any decimals and make sure the total of your investment choices adds up to 100%.

Section 2 - Future contributions

- Fund name 1
- Fund name 2
- Fund name 3
- Fund name 4
- Fund name 5
- Fund name 6
- Fund name 7
- Fund name 8
- Fund name 9
- Fund name 10

Percentage to invest in			
			%
			%
			%
			%
			%
			%
			%
			%
			%
			%
			%
1	0	0	%

Existing units

Section 3 - Existing units

Do not complete this section if you are investing in a lifestyle strategy. Complete this section if you wish to change the fund allocation of your future single and regular contributions. This option is only available to members still actively contributing to the scheme.

If you are selecting your own funds under this option please write the name of your chosen fund(s) in full. Write the percentage amounts of your investment choices next to the fund name. Do not use any decimals.

Funds you wish to switch OUT of.

Please specify the fund name and percentage of your existing fund holding that you wish to switch out.

		Percentage to switch OUT
Fund name 1		<input type="text"/> <input type="text"/> <input type="text"/> %
Fund name 2		<input type="text"/> <input type="text"/> <input type="text"/> %
Fund name 3		<input type="text"/> <input type="text"/> <input type="text"/> %
Fund name 4		<input type="text"/> <input type="text"/> <input type="text"/> %
Fund name 5		<input type="text"/> <input type="text"/> <input type="text"/> %
Fund name 6		<input type="text"/> <input type="text"/> <input type="text"/> %
Fund name 7		<input type="text"/> <input type="text"/> <input type="text"/> %
Fund name 8		<input type="text"/> <input type="text"/> <input type="text"/> %
Fund name 9		<input type="text"/> <input type="text"/> <input type="text"/> %
Fund name 10		<input type="text"/> <input type="text"/> <input type="text"/> %

Funds you wish to switch INTO.

Please specify the fund name and allocation of the proceeds switched out, for the funds you wish to switch into. Make sure the total of your investment choices in this section adds up to 100%.

		Percentage to switch IN
Fund name 1		<input type="text"/> <input type="text"/> <input type="text"/> %
Fund name 2		<input type="text"/> <input type="text"/> <input type="text"/> %
Fund name 3		<input type="text"/> <input type="text"/> <input type="text"/> %
Fund name 4		<input type="text"/> <input type="text"/> <input type="text"/> %
Fund name 5		<input type="text"/> <input type="text"/> <input type="text"/> %
Fund name 6		<input type="text"/> <input type="text"/> <input type="text"/> %
Fund name 7		<input type="text"/> <input type="text"/> <input type="text"/> %
Fund name 8		<input type="text"/> <input type="text"/> <input type="text"/> %
Fund name 9		<input type="text"/> <input type="text"/> <input type="text"/> %
Fund name 10		<input type="text"/> <input type="text"/> <input type="text"/> %
		100 %

Information and authorisation

Important information

Fund objectives: Fund objectives, risk ratings and charges of individual funds can change over time – so to check the latest information about your chosen fund(s).

Lifestyle switching: If you are currently invested in a 'lifestyle investment programme' and you choose to switch your units into a different investment fund(s), the lifestyle investment programme will end and all of your units will be switched to your new choice of investment fund(s). You cannot leave some of your units invested in a lifestyle investment programme.

Investment charges: Charges can vary between different investment funds, so switching into a different investment fund may result in higher charges. Please contact us for a full list of current fund charges.

Premier and the Trustees of your pension scheme take privacy very seriously.

Information use: We use the personal information from this form and any other information that you give us to: value your pension, maintain records for the purpose of payment of pensions, pension-related payments, pension communication, market research and to analyse statistics.

Information sharing: We will release information disclosed on this form to other companies within the Premier Pensions Management group of companies (and any future owners), the Trustee's professional advisers, insurance companies (where

requested by the Trustees of your pension scheme or you), other service providers who hold or process your data on our behalf and third parties to whom we are required to transfer data by law or regulatory requirements (e.g. government and regulatory authorities).

Fraud Prevention: We will check the details provided on this form with fraud prevention agencies. If you give false or inaccurate information and we identify fraud, we will pass your details to fraud prevention agencies. Law-enforcement agencies may access and use this information. We and other organisations may also access and use this information to prevent fraud and money laundering, for example, when processing a claim to pay benefits.

You can view our Privacy Notice here:

<https://premieradministration.co.uk/privacy-notice/>

Please contact us if you would like to view the Privacy Notice specific to your pension scheme.

Authorisation

I authorise Premier to switch my fund(s) and alter my fund choice for future contributions in accordance with the instructions on this form.

Sign and date

X	<table border="1"> <tr> <td style="width: 20px; text-align: center;">D</td> <td style="width: 20px; text-align: center;">D</td> <td style="width: 20px; text-align: center;">M</td> <td style="width: 20px; text-align: center;">M</td> <td style="width: 20px; text-align: center;">Y</td> <td style="width: 20px; text-align: center;">Y</td> <td style="width: 20px; text-align: center;">Y</td> <td style="width: 20px; text-align: center;">Y</td> </tr> </table>	D	D	M	M	Y	Y	Y	Y
D	D	M	M	Y	Y	Y	Y		