



Investment options form

For members of the TSB Pension Scheme

Action


Complete this form if you wish to change the investment of your pension account.


Before completing this form, read **Investment choices for the TSB Pension Scheme**. You can change your choices at any time.

Once you have completed the sections relevant to you in BLOCK CAPITALS and black ink, please sign, date and return to:

 Equiniti Limited, PO Box 4945, Aspect House, Spencer Road, Lancing BN99 8LQ

If you have any questions please contact Equiniti:

 0345 266 9214

 tsbpensions@equiniti.com

Section A – Your details

Title (e.g. Mr, Mrs, Dr):

Telephone number:

Forename(s):

Email address:

Surname:

National Insurance number:

Section B – Your investment approach

You can choose from two investment approaches: LifePlan or PersonalChoice. Please choose one investment approach. **Only tick one box.**

LifePlan

or

PersonalChoice

If you have chosen:

- LifePlan, complete Sections C and E; or
- PersonalChoice, complete Sections D and E.

Consider this

Please note that investments in the LifePlan approach will be automatically switched into lower-risk funds as you approach retirement. However, investments made using the PersonalChoice approach will remain invested in the same funds unless you choose to move them.

Section C – LifePlan

Only complete this section if you have chosen the LifePlan investment approach (in Section B).

Complete the two steps below to set up your own LifePlan strategy. **You can change your choices at any time.**

1

Choose your LifePlan (only tick one box).

Destination Drawdown or Destination Pension Annuity or Destination Cash

2

Choose your target retirement age. Your target retirement age can be any age between 55 and 75.

My target retirement age is . (If you don't make a choice, we will assume age 65.)

*Refer to the guide, Investment choices for the TSB Pension Scheme, for further information.

Section D – PersonalChoice

Only complete this section if you have chosen the PersonalChoice investment approach (in Section B).

Fill in how much you want to invest in each fund. You do not have to fill in every box; the PersonalChoice fund range is there for you to select the funds you specifically want to use.

Your investment choices must add up to 100%. All percentages must be whole numbers.

Asset Class	Fund Name	Accrued Funds	Future Contributions
Equity	Asia Pacific excluding Japan Equity	%	%
	Continental Europe Equity Fund	%	%
	Emerging Markets Equity Fund	%	%
	Global Equity Fund	%	%
	Japan Equity Fund	%	%
	North America Equity Fund	%	%
	UK Equity Fund	%	%
Bond	Corporate Bond Fund	%	%
	Index-Linked Gilt Fund	%	%
	Mixed Bond Fund	%	%
Multi-asset	Diversified Fund	%	%
	Growth Fund	%	%
Property	Property Fund	%	%
Cash	Cash Fund	%	%
Total		100%	100%

Section E – Your authorization

By signing and dating this form, you are requesting that your investment choices are carried out in line with your instructions and understand that they will usually be processed within 10 working days. If you have selected the LifePlan approach, you understand the Trustee is not recommending any specific approach to you.

If any part of this form is completed incorrectly or is incomplete, the Trustee reserves the right to treat your form as if it were not completed.

Data Protection

The Trustee of the Scheme is a data controller in respect of personal data processing for the administration of the Scheme.

As data controller, the Trustee holds and processes certain personal data about you, as a Scheme member, and possibly those of your dependants and beneficiaries. Personal data means information that can be used to identify you, such as your name. The Trustee holds and processes this data to properly administer the Scheme and to comply with the law.

The types of data the Trustee may collect and hold will include, for example, your national insurance number, date of birth and your postal address. The Trustee generally collects this data from you and from TSB. Some of the data the Trustee collects may be classed as 'sensitive data', such as information you tell us about your health when applying for ill-health pension benefits. The Trustee may require your consent to collect and hold this data.

As the Trustee is assisted by third parties to properly administer the Scheme, your personal data may be shared with these parties, including for example, the Scheme's administrator, the Trustee's professional advisers (such as the Scheme's lawyers), service providers, regulators and Government bodies. Your personal data may also be shared with TSB.

Further information on how the Trustee uses your personal data and your rights regarding that data can be found at www.tsbpensionscheme.co.uk/pensions_talk. If you have any questions you can call Equiniti on 0345 266 9214 or email tsbpensions@equiniti.com.

Signed:

Date:

Please return your completed form to Equiniti at the address provided on the front page.