

LF Stakeholder Pension Scheme

Fund Switch and Redirection Form

Important Information

You should complete this form if you wish to switch the fund(s) in which you are currently invested and/or redirect future regular monthly payments to your Plan.

Please complete appropriate sections in **BLACK** ink using **CAPITAL LETTERS**.

Important notes:

- Units will be sold at the first valuation point following receipt of your written instructions. The purchase of units will then take place at the next valuation point. This will normally be on the following working day. During this time, the value of your investment will not change with any general market movement.
- If you wish to switch your investment in the last five years leading up to your retirement and the Security Option applies to your Plan, the Security Option will automatically apply to any switches you make. Additional information is contained in the 'Terms and Conditions of the LF Stakeholder Pension Scheme' under section 8 of the Plan Conditions.
- Future contributions will normally be redirected from the next payment received following receipt of your written instructions.
- We require the return of this form with your signature before we can process your switch request. Please complete and return the form to: LFS, PO Box 1249, Cheltenham, GL50 9YL.

1. PERSONAL DETAILS

Plan number	<table border="1" style="border-collapse: collapse; text-align: center; width: 100%;"> <tr> <td style="width: 20px;">N</td> <td style="width: 20px;">W</td> <td style="width: 20px;">S</td> <td style="width: 20px;">H</td> <td style="width: 20px;">P</td> <td style="width: 20px;"></td> <td style="width: 20px;"></td> <td style="width: 20px;"></td> <td style="width: 20px;"></td> <td style="width: 20px;"></td> <td style="width: 20px;"></td> <td style="width: 20px;"></td> <td style="width: 20px;">0</td> <td style="width: 20px;">1</td> </tr> </table>	N	W	S	H	P								0	1
N	W	S	H	P								0	1		
Mr/Mrs/Miss/Ms/Other															
Surname															
Forename(s)															
Address	Postcode														
Contact telephone number															

2. FUND SWITCHING

You should complete this section if you wish to switch units in your existing fund(s) to one or more of our other funds.

From – Name of fund(s)	Units in fund to be switched (%)	To – Name of fund(s)	New allocation whole (%)
Example LF Cash Pension Fund	100%	<input checked="" type="checkbox"/> LF Tracker Pension Fund <input checked="" type="checkbox"/> LF Corporate Bond Pension Fund	<input type="text" value="40%"/> <input type="text" value="60%"/>
LF Cash Pension Fund	<input type="text" value=""/>	<input checked="" type="checkbox"/> LF Tracker Pension Fund <input checked="" type="checkbox"/> LF Corporate Bond Pension Fund	<input type="text" value=""/> <input type="text" value=""/>
LF Tracker Pension Fund	<input type="text" value=""/>	<input checked="" type="checkbox"/> LF Cash Pension Fund <input checked="" type="checkbox"/> LF Corporate Bond Pension Fund	<input type="text" value=""/> <input type="text" value=""/>
LF Corporate Bond Pension Fund	<input type="text" value=""/>	<input checked="" type="checkbox"/> LF Cash Pension Fund <input checked="" type="checkbox"/> LF Tracker Pension Fund	<input type="text" value=""/> <input type="text" value=""/>

3. REDIRECTING FUTURE REGULAR CONTRIBUTIONS

You should complete this section to change the fund(s) in which future contributions are invested. Please complete the table below, using whole percentages, indicating how you would like future contributions to be invested.

Fund	% Investment split Regular contributions
LF Cash Pension Fund	<input type="text" value=""/>
LF Tracker Pension Fund	<input type="text" value=""/>
LF Corporate Bond Pension Fund	<input type="text" value=""/>
Total	100%

4. AUTHORISATION

I hereby authorise LFS to switch my existing fund holdings and/or redirect future regular contributions in accordance with this instruction. I understand that the switch is subject to the Plan conditions.

Signature

Date

<input type="text" value="D"/>	<input type="text" value="D"/>	<input type="text" value="M"/>	<input type="text" value="M"/>	<input type="text" value="Y"/>	<input type="text" value="Y"/>	<input type="text" value="Y"/>	<input type="text" value="Y"/>
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