

Personal Pension Plan

# Fund switch and redirection form

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 contributions to your Plan.

Please complete and return the form to:

LFS  
PO Box 1043  
CHELTENHAM  
GL50 9JB

Please note that we require the return of this form with your signature before we can process your request.

### Personal details

Mr/Mrs/Miss/Ms/Other	<input type="text"/>
Surname	<input type="text"/>
Forename(s)	<input type="text"/>
Address	<input type="text"/>
	Postcode
Existing Plan number	<input type="text"/>

### I wish to change my Investment Allocation

For future contributions	<input type="checkbox"/>	For existing holdings	<input type="checkbox"/>
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**OPTION 1**

Self Selection funds

Please detail your choice of funds, using whole percentages and ensure your allocation totals 100%.

Fund	(Whole % only)
LF Cash	%
LF UK Gilt	%
LF Cautious Managed	%
LF Multi-Asset	%
LF Global Equity Index	%

OR

**OPTION 2**

Lifestyle Profile number (choose 1, 2, 3, 4, 5)

(Default profile is number 1). Further information regarding the profile options can be found in the [Guide to LF Investment Funds](#).

Target Retirement Age

Please confirm your Selected Retirement Age. This must be at least 55. Your Selected Retirement Age will be used for the purpose of automatically switching of funds during the pre-retirement phase switching period, as explained in the [Guide to LF Investment Funds](#).

Lifestyle profiles have two phases. During the growth phase, you invest in funds with the aim of maximising potential investment return for an appropriate level of risk. In the pre-retirement phase, the investment automatically switches into funds considered to have lower volatility.

**Declaration and signature**

I authorise LFS to switch my existing fund holdings and/or redirect future regular contributions in accordance with this instruction. I understand that once received by LFS, this instruction cannot be cancelled. I understand that the transaction unit price will be calculated as specified in the Prospectus, which is available at [pensions.linkassetservices.com](https://pensions.linkassetservices.com) or on request.

Print name (in **BLOCK CAPITALS**)

Signature

Date

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