

# Jaguar Pension Plans

## Additional Voluntary Contribution Request Form



Please refer to the notes section before completing this form.

### Personal Details

Name:	<input type="text"/>	Statement date:	<input type="text"/>
Address:	<input type="text"/>	NI Number:	<input type="text"/>
		Payroll Number:	<input type="text"/>
Date of Birth:	<input type="text"/>	Monthly Paid:	<input type="text"/>
		Weekly Paid:	<input type="text"/>

<p>Contribution Change</p> <p><input type="checkbox"/></p>
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<p>Cease Contributions</p> <p><input type="checkbox"/></p>
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<p>Investment fund Change (future contributions only)</p> <p><input type="checkbox"/></p>
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OR

<p><b>One off single Contributions only</b> - Please arrange for the total amount of _____ to be deducted as a one-off payment from my pay in the Tax Year ending 5<sup>th</sup> April _____ (please insert relevant year) to be invested as instructed below.</p>
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### Investment Options – Section 1 – Contribution change only

Please choose whether you would **either** like to contribute a fixed rate **or** a percentage of your gross earnings, indicating how much in each fund provider (Aegon (previously Scottish Equitable) or Prudential) if you are contributing a fixed rate.

N.B. If you wish to contribute a percentage, you can only choose one fund provider.

a) Fixed Rate Contribution	
£	<b>Aegon (previously Scottish Equitable)</b>
£	<b>Prudential Life Assurance Company</b>

OR

b) Percentage of Gross Earnings (max 8%)	
%	<b>Aegon (previously Scottish Equitable)/ Prudential Life Assurance Company (delete one)</b>

**Please return completed form to:**

Pensions Department, Block 17, 53S7/4d, Land Rover, Lode Lane, Solihull, B92 8NW

Reviewed: April 2014

Updated: April 2014



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### Investment Options – Section 2 – Investment fund change only

Please complete this section if you wish to transfer your current AVC investment(s) to a different fund (please note that Aegon was previously Scottish Equitable).

I wish to transfer my existing AVC investment(s) away from the following fund(s):

Investment Fund	Tick Appropriate Box
Prudential Deposit Fund	
Prudential With-Profits Fund	
Equitable Life With-Profits Fund	
Aegon Black Rock Aquila Global Equity 50:50 Index Fund	
Aegon Black Rock Aquila Global Equity 50:50 Index Lifestyle Fund	
Aegon Black Rock Aquila Consensus Index Fund	
Aegon Black Rock Aquila Over 15 Years UK Gilt Index Fund	
Aegon Black Rock Aquila Over 15 Years Corporate Bond Index Fund	
Aegon Cash Fund	
Aegon Black Rock Aquila UK Equity Index Fund	
Aegon Baillie Gifford International Fund	
Aegon Invesco Perpetual Income (UK Equity) Fund	
Aegon Ethical Fund	
Aegon Baillie Gifford Balanced Managed Fund	

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### Investment Options – Section 3

Please choose where you would like your contribution invested, choosing between the different Aegon (previously Scottish Equitable) funds or Prudential fund as per the amounts you indicated above.

Fund	Contribution	Tick Appropriate Box to Transfer
Prudential Deposit Fund	£ / %	
Aegon Black Rock Aquila Global Equity 50:50 Index Fund	£ / %	
Aegon Black Rock Aquila Global Equity 50:50 Index Lifestyle Fund	£ / %	
Aegon Black Rock Aquila Consensus Index Fund	£ / %	
Aegon Black Rock Aquila Over 15 Years UK Gilt Index Fund	£ / %	
Aegon Black Rock Aquila Over 15 Years Corporate Bond Index Fund	£ / %	
Aegon Cash Fund	£ / %	
Aegon Black Rock Aquila UK Equity Index Fund	£ / %	
Aegon Baillie Gifford International Fund	£ / %	
Aegon Invesco Perpetual Income (UK Equity) Fund	£ / %	
Aegon Ethical Fund	£ / %	
Aegon Baillie Gifford Balanced Managed Fund	£ / %	
<b>TOTAL</b>	<b>£ / 100%</b>	

For further details on the various funds listed above please go to <http://www.aegon.co.uk/Funds/Fund-factsheets/index.htm>.

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### Contact Details

If you have any questions or require any further information, please call the Jaguar Pension Helpline on 0845 078 2052 and speak with a Helpline Representative who will be able to answer any queries you may have. The Jaguar Pension Helpline is open between 9:00 a.m. and 5:00 p.m. Monday to Friday.

**Address for written correspondence** (Please note the address to which you must return this form is different and detailed at the bottom of each page):

JLT Benefit Solutions  
St James House  
7 Charlotte Street  
Manchester  
M1 4DZ

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I understand that the value of my AVCs may go down as well as up and that I could end up with less than I have paid in.

I authorise the deduction and investment of the appropriate contributions from my pay before tax in accordance with the instructions above. I have read and understood the AVC booklet and the notes below.

I understand that the Trustees of The Jaguar Pension Plan ('the Plan'), their advisers, the Plan administrator and my employer will need to process certain data about me. This data may include items categorised under the Data Protection Act 1998 as "sensitive" data. I accept that the Trustees, their advisers, the Plan administrator and my employer may need this data in order to calculate and pay my benefits and for the administration of the Plan. I agree to this processing.

**Member Name:**  
*(please print)*

**Member Signature:**  **Date:**

**Internal Telephone No:**  **Home Telephone No:**

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### **NOTES**

You should refer to the AVC booklet.

### **FIXED CONTRIBUTION RATE**

If you wish to contribute a regular fixed amount per pay period, enter the total amount in the box.

The minimum amount is £1.00 per week or £4.00 per month but you must ensure that the amount does not exceed 8% of your earnings. Your scheme contributions are not taken into consideration in the 8% maximum AVC contribution.

If you wish to split your investment, enter the amount in each column (as appropriate). For example, if you are making AVC payments of £10 per pay period and of that £10, you would like to pay £5 into one of the Aegon Funds and the other £5.00 into the Prudential Fund. When added together, the individual amounts must equal your total contribution.

### **PERCENTAGE CONTRIBUTION RATE**

Your deductions are deducted as a percentage of your GROSS pay.

If you want to make the maximum contribution, write MAX in the box. You may pay up to 8% or less of your gross pay into your chosen AVC fund.

If you wish to split your investment, you MUST split on a percentage basis of total AVC. For example, if you are making AVC payments of 5% per pay period and of that 5% you would like to pay 50% of the amount into one of the Aegon Funds and the other 50% into the Prudential Fund. When added together, the individual percentages must equal your total contribution.

### **FAIR COLLECTION NOTICE**

#### Data Protection

Prudential, Aegon and their other companies, and the Trustees or Managers of the Scheme will use the details and personal information you have given (together with any other information about you) for administration, servicing, risk assessment, fraud prevention and regulatory purposes. We may also need to disclose your information to our other service providers (including the Trustees' or Managers' advisors) for these purposes and to pass it to the sponsoring employer or the Inland Revenue.

Please note that you have a right to apply for a copy of your personal information (for which a fee may be charged) and to have any inaccuracies corrected.

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