

Jaguar Pension Plans

Additional Voluntary Contribution - Investment Change Form



Please refer to the AVC Guide before completing this form.

Personal Details

Name:	<input type="text"/>	Action to take effect from this 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"/>
Internal Telephone No	<input type="text"/>	Home Telephone No:	<input type="text"/>

Please complete Sections 1, 2 and 3 as applicable.

Section	When to complete this section
Section 1 – Investment fund change	Complete this section if you have existing assets and wish to disinvest from the funds in which you are currently invested.
Section 2 – Investment selection	Complete this section if you have chosen to disinvest in one or more funds in Section 1 or show how you want to invest your future contributions.
Section 3 – Declaration	You must complete this Section, to confirm your instructions.

Notes:

- If you would like to change the amount you contribute, please complete and return an 'Additional Voluntary Contribution - Contribution Rate Form'. This can be found on the JLR Pensions website
- More information on the funds available, including a description and the charges available in the AVC Fund Guide and on the JLR Pensions website.
- If you would like to invest your AVCs in a way that is not possible using this form please contact the Plan administrator, JLT, on 0345 078 2052.

Data protection

The Trustees or Managers of the Plan, and their AVC providers (L&G, Aegon, Prudential and their other companies) 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.

Please return completed form to:
 JLT Benefit Solutions, St James House, 7 Charlotte Street, Manchester, M1 4DZ
Or scan/email your form to:
 jaguar@jltgroup.com

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Section 1 – Investment fund change

Please complete this section if you wish to transfer your current AVC investment(s) to a different fund. If you switch out of your existing section you must also complete Section 2 to indicate where you want your existing assets invested.

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

Lifestyle strategy	Tick appropriate box
Lifestyle strategy (you cannot split your investments between this strategy and any other L&G funds)	

Or

Legal & General Investment Funds	Tick appropriate box
L&G Cash Fund 3	
L&G Over 15 Year Gilts Index Fund 3	
L&G Over 5 Year Index-linked Gilts Index Fund 3	
L&G AAA-AA-A Corporate Bond Over 15 Year Index Fund 3	
L&G (PMC) Diversified Fund 3	
L&G Schroder Dynamic Multi Asset Fund 3	
L&G Property Fund 3	
L&G (PMC) Ethical Global Equity Index Fund 3	
L&G (PMC) UK Equity Index Fund 3	
L&G Global Equity Market Weights 30:70 Index Fund 75% GBP Currency Hedged Fund 3	
L&G Artemis Income Fund 3	
L&G HSBC Life Amanah Fund 3	
L&G (PMC) World Emerging Markets Equity Index Fund 3	
L&G JP Morgan Emerging Markets Fund 3	
L&G M&G Global Leaders Fund 3	

Prudential and Aegon Investment Funds	Tick appropriate box
Prudential Deposit Fund	
Prudential With-Profits Fund	If you switch out of either of these funds you will not be able to make any future contributions to these funds or switch back in at a later date.
Aegon With-Profits Fund	

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Section 2 – Investment selection

Please choose where you would like your current investments and/or future contributions invested, choosing between the different funds. If you currently invest in the Aegon With-Profits fund you can switch out of it but you are not able to switch into it.

Lifestyle strategy	Tick appropriate box(es)	
	Existing investments (must be 100%)	Future contributions (must be 100%)
Lifestyle strategy (you cannot split your investments between this strategy and any other L&G funds)		

My chosen Target Retirement Age (Lifestyle strategy only) is	
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Please note that your chosen Target Retirement Age is used only for the purposes of how the Lifestyle strategy invests and does not affect your Normal Retirement Age in the Scheme.

Or

Legal & General Investment Funds	Existing investments (must total 100%)	Future contributions (must total 100%)
L&G Cash Fund 3		
L&G Over 15 Year Gilts Index Fund 3		
L&G Over 5 Year Index-linked Gilts Index Fund 3		
L&G AAA-AA-A Corporate Bond Over 15 Year Index Fund 3		
L&G (PMC) Diversified Fund 3		
L&G Schroder Dynamic Multi Asset Fund 3		
L&G Property Fund 3		
L&G (PMC) Ethical Global Equity Index Fund 3		
L&G (PMC) UK Equity Index Fund 3		
L&G Global Equity Market Weights 30:70 Index Fund 75% GBP Currency Hedged Fund 3		
L&G Artemis Income Fund 3		
L&G HSBC Life Amanah Fund 3		
L&G (PMC) World Emerging Markets Equity Index Fund 3		
L&G JP Morgan Emerging Markets Fund 3		
L&G M&G Global Leaders Fund 3		
Prudential Investment Fund		
Prudential Deposit Fund (this fund is only available if you were paying in to it prior to May 2017)		
Total – for Legal & General and Prudential Investment Funds should equal 100%		

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Section 3 – Declaration

I understand that the value of my AVCs may go down as well as up, which may result in a fund value that is 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, in order to calculate and pay my benefits and for the administration of the Plan. This data may include items categorised under the Data Protection Act 1998 as "sensitive" data. I agree to this processing.

Member Name:
(please print)

**Member
Signature:**

Date: