

BAE Systems Pension Scheme – 2000 Plan Benefits

Application to change investment instructions for Additional Voluntary Contributions (AVCs) to the Selected Benefits Scheme (SBS) and/or Standard Life

BAE SYSTEMS

This form is to enable existing AVC contributors to change their current investment instructions without changing the amount of contributions paid.

Member Information

Surname		Forename(s)	
NI number		Date of Birth	
Email			
Address & contact telephone number			

Section A – To be completed in ALL cases

Complete this section to advise how your AVCs are to be invested with Standard Life or SBS until further notice. **Choose one of a), b), c) or d) below.**

I wish my AVCs to be invested in:

- a) the Cash Lifestyle Investment Profile with Standard Life
- b) the Flexible Lifestyle Investment Profile with Standard Life
- c) the Annuity Lifestyle Investment Profile with Standard Life

Lifestyle Investment Profile notes:

1. Selection of a Lifestyle Investment Profile covers your entire contribution: it is not possible to combine a Lifestyle Investment Profile with any of the available standalone funds. The only exception to this rule is for members who were With Profits contributors prior to 1 February 2011. If you fall into this category, you may combine a Lifestyle Investment Profile with a With Profits fund contribution.
2. When selecting a Lifestyle Investment Profile, you may nominate a Target Retirement Age (TRA), which is earlier than the Plan's Normal Retirement Age of age 65. The Lifestyle Investment Profile will then commence the switching process 15 years from your nominated TRA. The Trustees will treat any information provided in relation to TRA with utmost confidentiality. You need only specify a TRA if other than age 65.

I wish my TRA for the purposes of the Lifestyle Investment Profile to be age

- d) I do not wish to invest in a Lifestyle Investment Profile and instead wish my AVCs to be invested as set out in Sections B and C (including investment in SBS)

You may wish to consider taking independent financial advice prior to completing this form. If you need financial advice you will find information about Independent Financial Advisers in your area on www.unbiased.co.uk

Section B – Only to be completed if you ticked box d) in Section A

If you chose option d) you must now choose one of 1), 2) or 3) below and then complete the table in Section C detailing your fund choices. I wish the fund choices indicated in the table below to apply to:

- 1) my future contributions only
- 2) my existing AVC fund only
- 3) all my AVC funds including future contributions

Notes:

Funds move in different ways and can go up as well as down and therefore the percentages you choose to invest now may not continue to be the same percentages in the future. Members can transfer their SBS funds into Standard Life AVC funds; it is not permitted for members to transfer their Standard Life AVC funds into the SBS funds.

Section C – Only to be completed if you ticked box d) in Section A

Complete this Section to advise how your AVCs (as indicated in Section B) are to be invested with Standard Life or the SBS until further notice.

Fund Name	Monthly AVCS	Single AVC Lump Sum (from taxable earnings) (Whole % Only)		
SBS Retirement Fund		£	OR	%
Money Market Fund		£	OR	%
Diversified Asset Fund		£	OR	%
Annuity Purchase Fund		£	OR	%
Inflation-linked Government Bond Fund		£	OR	%
Bond Fund		£	OR	%
Fixed Government Bond Fund		£	OR	%
Property Fund		£	OR	%
Passive UK Equity Fund		£	OR	%
Active UK Equity Fund		£	OR	%
Passive Global Equity Fund		£	OR	%
Active Global Equity Fund		£	OR	%
Emerging Market Equity Fund		£	OR	%
Socially Responsible Investment Fund		£	OR	%
Shariah Fund		£	OR	%
Standard Life Managed Pension Fund		£	OR	%
Total	100%	100%		

Fund split should be in whole % only

I authorise the Trustees to invest my AVCs in the revised selections shown above as soon as practicable after submission of this request.

Signature

Date

Please return this form to: Pensions Service Centre, PO Box 1193, Crawley, West Sussex, RH10 0FY

The Trustee will collect and process information about you that may be subject to data protection laws. For more information about how we use and disclose your personal information, how we protect your information, our legal basis to use your information, your rights and who you can contact, please refer to the relevant sections of our Privacy Notice at www.baesystems.com/en/privacy.