

BAE Systems Pension Scheme ('the Scheme')

Application to change Level to Level 125, 167, 187 or 200 from 6 April 2021

Full Name	
Date of Birth	
National Insurance Number	
Member Number	
Contact Number	
Email*	

**Please provide an email address or we will not be able to acknowledge your application.*

Current Membership Level (tick one only)

Level 125

 Level 167

 Level 187

 Level 200

Members from Level 100+ are not permitted to change to Level 125, 167, 187 or 200

New Membership Level (tick one only)

I wish to choose the Level indicated below with effect from 6 April 2021

- Level 125** Earns pension based on a target rate of 1.25% a year
Employee contribution of 7.29% of Contribution Earnings*
- Level 167** Earns pension based on a target rate of 1.67% a year
Employee contribution of 9.29% of Contribution Earnings*
- Level 187** Earns pension based on a target rate of 1.87% a year
Employee contribution of 11.29% of Contribution Earnings*
- Level 200** Earns pension based on a target rate of 2.00% a year
Employee contribution of 12.59% of Contribution Earnings*

*** Please refer to the Scheme Booklet for the definition of Contribution Earnings**

I understand that my membership of Level 187 or 200 may be restricted if my potential total benefits (including those from other pension arrangements) are likely to exceed those permitted under the Scheme Maximum Limit at my normal retirement age. I authorise my employer to deduct from my pay, the new rate of contributions due from me. I agree to be bound by the provisions of the Trust Deed and Rules of the Scheme.

Signed: _____ **Date:** _____

You are required by the Trustee of the Scheme to provide information about previous pension arrangements. This is because the Trustee must ensure that your overall benefits do not exceed the Scheme Maximum. Please complete the following to the best of your knowledge.

Part 1

Have you ever been a member of a pension scheme (excluding the BAE Systems Pension Scheme) including any arrangements with a previous employer including armed forces or a pension policy with an insurance company including personal pension policies or Free Standing Additional Voluntary Contribution arrangements?

YES/NO

If you have answered NO to Part 1, please go to Part 4

If you have answered YES to Part 1, please go to Part 2

Part 2

In respect of your membership in a previous pension arrangement, have you/will you have any entitlement to a pension?

YES/NO

If you have answered NO to Part 2, please go to Part 4

If you have answered YES to Part 2, please go to Part 3

Part 3

Please attach a copy or copies of your latest statement(s) from your previous pension provider(s) to this questionnaire.

Enclosed Documentation	Yes	No
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DECLARATION

I confirm that I have declared, to the best of my knowledge all information relating to my previous pension arrangements. I also authorise the Trustee of the BAE Systems Pension Scheme to verify the benefits I have declared with the appropriate pension providers.

Signed: _____ *Date:* _____

Part 4

Part 4 should only be completed if you have answered NO to Part 1 or Part 2.

DECLARATION

I confirm that to the best of my knowledge I have no benefit entitlements from any previous pension arrangements.

Signed: _____ *Date:* _____

Please return this form and any attachments to the address below, or by email, by **5 February 2021** so that your request may be processed with effect from 6 April 2021.

Please refer over the page for further details on how to return this form.

Please return this form and any attachments to the address below, or by email, by **5 February 2021**:

Pensions Service Centre, PO Box 1193, Crawley, West Sussex, RH10 0FY

Email: farnborough.pensions@equiniti.com

If you do not have access to a printer or scanner please save and complete the form on line, type your name in the "Signed" areas of the form, as applicable, and attach it to an email which should be sent from a BAE Systems or other Participating Employer email address. If you do not have access to a BAE Systems or other Participating Employer email address, an email will need to come from a personal email account. Where the form is sent by email from a personal account, to verify the submission, you will also need to have your signature photographed and sent as an attachment with the email.

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