



## IBM Pension Plan (M Plan Section)

### Deferred Members - Change of Investment Instructions

Use this form to change the investment of:

- **Main Plan and/or**
- **Additional Voluntary Contributions and Additional Smart\* Contributions**

*NB Additional **Smart\*** Contributions (ASCs) were introduced under the Company's flexible reward scheme on 6 January 2006.*

Surname \_\_\_\_\_ First Name(s) \_\_\_\_\_

Employee Serial Number \_\_\_\_\_

#### Section A – What investment strategy would you like for your Retirement Account?

I would like my Retirement Account invested as follows:

*Please tick the relevant box for investment strategy you would like for your Main Plan and any ASCs/AVCs. They can be invested in the same or different strategies.*

| Investment Strategy   | Main Plan | ASCs/AVCs |
|---|-----------|-----------|
| <i>Lifestyle</i>  |           |           |
| Please record your Target Retirement Age here (up to age 75): |           |           |
| <i>Freestyle</i> (please complete Section B below)            |           |           |

#### Section B – Complete this section if you want your Retirement Account invested in Freestyle

**Important** – if either your Main Plan and/or ASCs/AVCs were previously invested in *Lifestyle*, completing this section will mean that your Main Plan and/or ASC/AVC fund Retirement Account will no longer be invested in a *Lifestyle* strategy.

Please switch my Main Plan and ASCs/AVCs to the percentages quoted below:

*The percentages quoted should reflect how you would like your Retirement Account invested AFTER the switches have been made.*

|  | Main Plan   | ASCs/AVCs   |
|--|-------------|-------------|
| <b>Barclays Global Investors Funds</b>         |             |             |
| UK Equity Index Fund                           | %           | %           |
| World (Ex-UK) Index Fund                       | %           | %           |
| Corporate Bond Index Fund (Over 15 years)      | %           | %           |
| <b>Legal &amp; General Funds</b>               |             |             |
| Global Equity Fixed Weights (60:40) Index Fund | %           | %           |
| Global Equity (70:30) Index Fund               | %           | %           |
| Annuity Protection Fund                        | %           | %           |
| Over 15 Year Gilt Index Fund                   | %           | %           |
| Consensus Index Fund                           | %           | %           |
| Cash Fund                                      | %           | %           |
| Ethical UK Equity Index Fund                   | %           | %           |
| <b>Total</b>                                   | <b>100%</b> | <b>100%</b> |

This form should only be used for switching existing L&G or BGI investments. If you have any investment with Friends Provident that you would like to disinvest, please complete the 'FP EL Disinvestment form' that is available on the website or from IBM Pension Services.

**Please complete the declaration overleaf**



**Declaration**

I authorise the Trustee to switch my Retirement Account in line with my instructions overleaf.

Signature ..... Date .....

Please return this completed form is returned to IBM Pension Services:

IBM Pension Services  
Mailpoint C1A  
PO Box 41  
North Harbour  
PORTSMOUTH  
PO6 3AU

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