



## IBM Pension Plan and IBM IT Solutions Pension Scheme

### Change of Investment Instructions for

#### Additional Smart\* Contributions (ASCs) and Additional Voluntary Contributions (AVCs)

**Deferred members only** – complete this form to record where you want your BlackRock and/or Legal & General ASCs/AVCs invested (ASCs were introduced under the Company's flexible reward scheme, **You\***, on 6 January 2006).

|                                   |
|-----------------------------------|
| Surname _____ First Name(s) _____ |
| Employee Serial Number _____      |

Please complete Sections A, B (if appropriate) and C

#### Section A – What investment strategy would you like for your ASCs/AVCs?

I would like my ASCs/AVCs invested as follows:

| Investment Strategy  | Tick relevant box        |
|--|--------------------------|
| <i>Lifestyle</i> with a Target Retirement Age of _____ Years | <input type="checkbox"/> |
| <i>Freestyle</i>   | <input type="checkbox"/> |

#### Section B – Complete this section if you want your ASCs/AVCs invested in *Freestyle*

**Important** – If your ASCs/AVCs were previously invested in a *Lifestyle* investment strategy, completing this section will mean that your ASCs/AVCs will no longer be invested in *Lifestyle*.

#### Your new investment instruction for ASCs/AVCs

Please specify the funds you now require your ASCs/AVCs to be invested:

| BlackRock Funds                                |                        |
|--|------------------------|
| UK Equity Index Fund                           | <input type="text"/> % |
| World (ex-UK) Equity Index Fund                | <input type="text"/> % |
| Corporate Bond Index Fund (Over 15 years)      | <input type="text"/> % |
| Legal & General Funds                          |                        |
| Global Equity Fixed Weights (60:40) Index Fund | <input type="text"/> % |
| Global Equity (70:30) Index Fund               | <input type="text"/> % |
| Annuity Protection Index Fund                  | <input type="text"/> % |
| Over 15 Year Gilts Index Fund                  | <input type="text"/> % |
| Consensus Index Fund                           | <input type="text"/> % |
| Ethical UK Equity Index Fund                   | <input type="text"/> % |
| Cash Fund                                      | <input type="text"/> % |
| <b>Total</b>                                   | <b>100%</b>            |

This form should only be used for re-investing existing Legal & General investments. If you have investments with Friends Provident or Equitable Life that you would like to disinvest, please complete the 'FP/EL Disinvestment' form also available on the website.



**Section C - Declaration**

Please arrange for the switches to my ASCs/AVCs to be made as detailed overleaf.

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

**Please return this completed form to Pensions Services at the address below**

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

**Data Protection Act 1998**

The information provided on this form and any other information that you provide, will be held in accordance with the Data Protection Act 1998. IBM (United Kingdom) Pensions Trust Limited ('The Company') and its group companies (and companies processing data on their behalf), will, from time to time, hold and use this information as reasonably necessary in connection with the administration of the relevant pension schemes. This information may be transferred to, or accessible from, those countries in which the Company and its group companies operate.