



IBM Pension Plan and IBM IT Solutions Pension Scheme

Defined Benefit Members (C, N, I and DSL Plans)

Change of **Freestyle** investment instructions for your **existing** Additional **Smart*** Contributions (ASC) and Additional Voluntary Contributions (AVC) fund

Current employees only – complete this form to record where you want your BlackRock and/or Legal & General ASCs/AVCs invested.

Complete the online application to change your investment election for future *Freestyle* contributions.

To move from *Freestyle* to a *Lifestyle* investment strategy, you should complete the Pensions Lotus Notes Online Application only. Your existing fund will automatically move to *Lifestyle* along with any new contributions.

NB If you have funds with either Equitable Life or Friends Provident, please download and complete the 'FP EL Disinvestment form' on the Pensions Trust website.

Surname First Name(s)

Employee Serial No

Please complete Sections A and B

Section A – Complete this section if you want to change your *Freestyle* investment instructions or are moving to *Freestyle* from *Lifestyle*

Important – If your existing ASC/AVC fund was previously in a *Lifestyle* investment strategy, completing this section will mean that your existing fund and any new contributions will no longer be invested in *Lifestyle*.

Your new investment instruction for ASCs/AVCs

Please switch my existing ASC/AVC fund in the percentages quoted below:

(NB The percentages quoted should reflect how you would like your ASC/AVC fund invested AFTER the switches have been made.)

BlackRock Funds	% of your ASC/AVC investment
UK Equity Index Fund	%
World (ex-UK) Index Fund	%
Corporate Bond Index Fund (Over 15 years)	%
Legal & General Funds	
Global Equity Fixed Weights (60:40) Index Fund	%
Global Equity (70:30) Index Fund	%
Annuity Protection Index Fund	%
Over 15 Year Gilts Index Fund	%
Consensus Index Fund	%
Ethical UK Equity Index Fund	%
Cash Fund	%
Total	100%

Please sign the declaration and read the notes overleaf



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Section B – Declaration

Please arrange for the switches to my existing ASC/AVC fund to be made as detailed overleaf.

Signature Date

Important!

1. You can request a switch once in any pay month.
2. If your ASC/AVC fund was previously in a *Lifestyle* investment strategy, completing the *Freestyle* section overleaf will mean that your existing fund and any new contributions will no longer be invested in the *Lifestyle* strategy
3. This form will only switch your existing ASC/AVC fund. Any change to your investment instructions for future contributions should be actioned using the Pensions Lotus Notes Online Application. You can check whether you have the application on your Lotus Notes workspace, it looks like this:



If you don't have the database on your workspace, you can find details on how to obtain it on the Pensions Trust website: www.smartpensionsuk.co.uk. You should log in using your IBM intranet details and go to ASCs/AVCs/Lotus Notes Online Application..

By requesting this switch to your existing fund, you need to be aware of the following:

- L&G and BlackRock have different procedures and timings for buying and selling
- Switching between investment managers will mean your funds will not be invested for a few days.

Detailed below is the timing of any switches you have requested. Please note, 'Day 0' is the day that Pensions Trust receive your request to switch.

L&G to L&G

Day 0	Day 1	Day 2	Day 3	Day 4	Day 5
Request to switch received	L&G sell and buy				

BlackRock to BlackRock

Day 0	Day 1	Day 2	Day 3	Day 4	Day 5
Request to switch received		BlackRock sell and buy			

L&G to BlackRock

Day 0	Day 1	Day 2	Day 3	Day 4	Day 5
Request to switch received	L&G sell			BlackRock buy	

BlackRock to L&G

Day 0	Day 1	Day 2	Day 3	Day 4	Day 5
Request to switch received		BlackRock sell			L&G buy

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.

Please return the completed form to:

Pensions Services, IBM UK Pensions Trust Limited, Mailpoint CIA, PO Box 41, North Harbour, Portsmouth PO6 3AU