



IBM Pension Plan – M Plan Section

New investment instructions for your Retirement Account – Deferred members only

Surname First Name(s)

Employee Serial No Email

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

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

I would like my deferred Retirement Account (including any ASCs/AVCs) invested as follows:

Please tick where you would like your Main Plan and any ASCs/AVCs invested. They can be invested in the same or different strategies.

Investment Strategy	Main Plan	ASCs/AVCs
Lifestyle	<input type="radio"/>	<input type="radio"/>
Please record your Target Retirement Age here <input type="text"/>		
Freestyle (please complete Section B below)	<input type="radio"/>	<input type="radio"/>

Section B – Complete this section if you want your fund invested in Freestyle

Important – if either your Main Plan and/or ASC/AVC fund was previously in a Lifestyle investment strategy, completing this section will mean that your Main Plan and/or ASC/AVC fund will no longer be invested in Lifestyle.

Please switch my Main Plan and any ASC/AVC funds in the percentages quoted below:

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

Legal & General Funds	% of your Main Plan investment	% of your ASC/AVC investment
UK Equity Index Fund	%	%
World (ex-UK) Developed Equity Index Fund	%	%
Pre-Retirement Bond Fund	%	%
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%	100%

Please sign the declaration and read the notes overleaf



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Section C – Declaration

Please arrange for the switches to my existing Retirement Account to be made as detailed overleaf.

Signature Date

Important!

1. You can request a switch once in any calendar month.
2. You can invest your Main Plan and any ASCs/AVCs in different investment strategies i.e. *Lifestyle* or *Freestyle*.
3. If either your Main Plan or ASC/AVC Retirement Account was previously in a *Lifestyle* investment strategy, completing the *Freestyle* section overleaf for either will mean that your fund will no longer be invested in the *Lifestyle* strategy.

By requesting this switch to your existing fund, you need to be aware of the timing of any switches you have requested. Please note, 'Day 0' is the day that Pensions Trust receive your request to switch.

Day 0	Day 1
Request to switch received	L&G sell and 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