



IBM Pension Plan – M Plan Section

M Plan Future Contributions form: new investment instruction for future contributions (Active employees only)

Active employees who wish to switch their existing Retirement Account must complete an M Plan Switch form.

Surname.....	First Name(s).....
Employee Serial No.....	Email.....

Please complete Sections A, B (as appropriate), C (as appropriate) and D

Section A – Which investment strategy would you like for your future contributions?

Once your completed form has been received, your new investment election will be applied to your next contribution, subject to payroll deadlines (approximately seven days before you are paid). You can find out the deadline date at www.smartpensionsuk.co.uk.

Please tick where you would like your funds 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"/>		

Please complete Section D. **By electing Lifestyle your existing fund will switch in line with the Lifestyle strategy.**

Freestyle (please complete Section B below)	<input type="radio"/>	<input type="radio"/>
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If you have selected Freestyle please complete Sections B, C and D.

Section B – Complete this section if you would like your future contributions invested in Freestyle.

Important – If your **existing** Main Plan and/or ASC/AVC funds are invested in a Lifestyle strategy, selecting a Freestyle fund will mean that your funds (and any future contributions) will no longer be invested in a Lifestyle strategy.

Fund name	% 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	%	%
Total	100%	100%

Please sign the declaration and read the notes overleaf



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Section C – Investment of your existing Retirement Account – please tick

1. My election applies to future contributions only. I do not wish to change the investment of my existing Retirement Account
2. I wish to change the investment of my existing Retirement Account (please select a or b):
- a) Please switch my existing Retirement Account to match my investment election for my future contributions immediately
- b) I would like to make a different investment election for my existing Retirement Account (please complete 'M Plan Switch' form)

Section D – Declaration

Please arrange for my future investment election and/or switches to my existing Retirement Account to be made as detailed on this form.

Signature Date

Important

All members:

- You can request a switch once in any pay month.
- You can invest your Main Plan and any ASCs/AVCs in different investment strategies i.e. *Lifestyle* or *Freestyle*.
- A *Freestyle* switch request will be actioned within five working days.
- Your switch will be based upon the unit prices **before** the switch.
- If either your existing Main Plan and/or ASC/AVC funds in your Retirement Account are currently invested in:
 - The *Lifestyle* strategy – selecting *Freestyle* overleaf for your Main Plan and/or ASCs/AVCs will mean that your existing fund (and any future contributions) will no longer be invested in the *Lifestyle* strategy.
 - Freestyle* – selecting *Lifestyle* overleaf for your Main Plan and/or ASCs/AVCs will mean that your existing fund (and any future contributions) will be invested and realign with the *Lifestyle* strategy.

Active employees only:

- An investment election for future contributions will be applied to the next contribution, subject to payroll deadlines (approximately seven days before you are paid).
- Matched Contributions are invested as detailed below:
 - Employee elected Matched Contributions are invested in line with any ASC/AVC investment instructions.
 - Company Matched Contributions are invested in line with your Main Plan Investment instructions.

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