



## IBM Pension Plan – M Plan Section

### M Plan Switch form: switch instruction for your existing Retirement Account

Active employees who wish to change their investment election for future contributions must complete an M Plan Future Contributions form.

Surname ..... First Name(s) .....

Employee Serial No ..... Email .....

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

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

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

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

Investment Strategy	Main Plan	ASCs/AVCs
<b>Lifestyle</b>	<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.**

<b>Freestyle</b> (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 existing Retirement Account invested in Freestyle.

**Important** – If your **existing** Main Plan and/or ASC/AVC funds are currently 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.

Please switch my existing funds in the percentages quoted below (the percentages quoted will be based upon the unit prices before the switch has been made.)

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	%	%
<b>Total</b>	<b>100%</b>	<b>100%</b>

Please sign the declaration and read the notes overleaf

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#### Section C – Investment of your future contributions (Active employees only) – please tick

1. I do not wish to change the investment of my future contributions

2. I wish to change the investment of my future contributions (please select a or b):

a) Please change the investment of my future contributions to match the switch shown overleaf

b) I would like to make a different investment election for my future contributions (please complete 'M Plan Future Contributions' form)

#### Section D – Declaration

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

Signature .....

Date .....

#### Important

##### All members:

1. You can request a switch once in any pay month.
2. You can invest your Main Plan and any ASCs/AVCs in different investment strategies i.e. *Lifestyle* or *Freestyle*.
3. A *Freestyle* switch request will be actioned within five working days.
4. Your switch will be based upon the unit prices **before** the switch.
5. 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:

6. An investment election for future contributions will be applied to the next contribution, subject to payroll deadlines (approximately seven days before you are paid).
7. 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**