

GPEN36 0421

Who this form is for

This form is for anyone who wishes to change the way in which units under their pension contract are invested – excluding any plans in drawdown. When we refer to ‘Standard Life’ we mean ‘Standard Life Assurance Limited’.

You can register or log in at www.standardlife.co.uk to change your investments online.

Filling in this form

Before filling in this form you should refer to the ‘How to choose the right investment options for your pension’ booklet applicable to your plan for information on the investment funds currently available to you.

Parts 1 and 5 should always be completed. Parts 2 and/or 3 should be completed depending on your requirements.

If you are changing investment funds for a Small Self-Administered Scheme (SSAS), please refer to **Note A** below before completing this form.

Please use BLOCK CAPITALS to fill in this form. Do not use correction fluid if you make a mistake. If you need to correct a mistake, please initial any changes you make.



If you are receiving advice from a financial adviser, you should remember that the adviser is acting on your behalf not only in giving advice, but also regarding the completion of this form.

Notes

- a. For SSAS, this form should be used for changes to your investment instructions within the Retirement Account Plan only. Fund switches for SSAS will relate to all members. This is because SSAS is a pooled fund and fund switches for an individual are prohibited. If money is to be transferred elsewhere (e.g. to Standard Life Investments), please contact the Standard Life SSAS unit who will advise on what action to take.
Please note: Lifestyle Profiles are not available under a SSAS.
- b. All units in a Lifestyle Profile must be sold before an investment can be switched to a different Profile or to invest in any unitised fund other than a with profits fund. If you choose a Lifestyle Profile and you wish to combine this with another investment fund, you can only combine this with the with profits fund applicable to your plan. Please refer to the ‘How to choose the right investment options for your pension’ booklet applicable to your plan for details of the with profits fund available to you. It is not possible to select more than one Lifestyle Profile at a time. If you select a Lifestyle Profile, future payments will automatically buy units in the Profile at the percentage specified in Part 2.
For more information about Lifestyle Profiles please read our ‘Lifestyle Profiles’ leaflets.
- c. For investments in a with profits fund, in order to maintain fairness and equity, we will adjust with profits unit prices in certain circumstances. For further details please refer to your policy provisions.

Part 1 – Plan or scheme details

Employer's/ Business Name	
Scheme/ Plan No	
Scheme Name	
Member's Name	
Membership/ Reference No.	

Part 2a – Selling units in your existing pension funds

Please **SELL** units currently held in the following Lifestyle profile and/or the pension funds listed below. Please note that the **fund code(s)** and the **FULL fund name(s)** must be included on this form in order for us to process your application. If we do not have this information we may have to return your application. Please refer to the ‘How to choose the right investment options for your pension’ booklet applicable to your plan for details of the funds available to you. Please read **Note C on page 1** if you are considering selling units in a with profits fund.

Changing the funds in which your plan is invested is called switching and can be done at any time. We will not normally make a charge for switching funds, however we reserve the right to charge if a switch involves a fund linked to the fund of an external fund manager and that manager charges us for the switch.

Fund code	Fund name (in full)	% to be sold

Your financial adviser will be able to provide information on your funds or you may wish to contact Standard Life.

If your current allocation is e.g. 50% Pension Managed One Fund and you wish to sell all of your Pension Managed One Fund holdings, you should write Pension Managed One Fund under name and write 100% alongside it.

In exceptional circumstances, a request to change funds may be deferred for up to one month, for six months if the fund invests directly or indirectly in property and for longer if the fund invests in an external fund.

If you wish to sell an equal percentage of all your funds then simply write that percentage in the box provided.

Part 2b – Buying units with the proceeds of your sale

AND with the proceeds **BUY** units in the following Lifestyle profile and/or the pension funds listed below.

Please note that the **fund code(s)** and the **FULL fund name(s)** must be included on this form in order for us to process your application. If we do not have this information we may have to return your application. Please refer to the ‘How to choose the right investment options for your pension’ booklet applicable to your plan for details of the funds available to you (please read **Note C on page 1** if you are considering investing in a with profits fund). You can choose to invest in more than one fund, but you must ensure that the total percentage adds up to 100%.

If you are currently invested in a Lifestyle profile, please read **Note B on page 1**.

Fund code	Fund name (in full)	%
Total Please ensure the total percentage adds up to 100%		100 %

You can switch your payments in and out of various funds to change the mix of investments. We may delay switching in some circumstances. You can usually only invest in up to 12 of our funds at any one time.

Depending on which funds you switch out of and in to, different charges may apply.

Part 3 – Future investments

*If you have selected to **BUY** units in a Lifestyle Profile in the previous section please go to Part 4. Please **BUY** units with my future pension payments in the following pension funds: Please note that the fund code(s) and the FULL fund name(s) must be included on this form in order for us to process your application. If we do not have this information we may have to return your application. Please refer to the ‘How to choose the right investment options for your pension’ booklet applicable to your plan for details of the funds available to you (please read **Note C on page 1** if you are considering investing in a with profits fund).

If you are currently invested in a Lifestyle profile, please read **Note B on page 1**.

Fund code	Fund name (in full)	%
Total Please ensure the total percentage adds up to 100%		100 %

Depending on which funds you switch out of and in to, different charges may apply.

* Please note that if a Lifestyle Profile has been selected in the previous section, units will be automatically bought in the profile by future payments (at the same percentage specified in the previous section).

Part 4 – Data Protection Notice

We’re committed to maintaining the trust and confidence of our customers. Our Privacy Policy explains how we use our customers’ personal information. It explains when and why we collect personal information about our customers, how we use it, the conditions under which we may share it with others and how we keep it secure. It also explains how you can obtain details of the information we hold about you, and the choices you have about how we use that information. You can get a copy of our Privacy Policy on our website: <https://www.standardlife.co.uk/privacy/standard-life-assurance-limited>

Part 5 – Authorisation

a. **Trustees’ Agreement** To be completed for all Group Plans and Executive Pension Plans NOT written under Stanplan A, Retirement Account Plans, Group AVC Plans and all Small Self-Administered Schemes.) The Trustee(s) agree(s) to these changes. For and on behalf of the Trustee(s).

Signature	▶	<input type="text"/>	Date (DD/MM/YYYY)	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Signature	▶	<input type="text"/>	Date (DD/MM/YYYY)	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Signature	▶	<input type="text"/>	Date (DD/MM/YYYY)	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Signature	▶	<input type="text"/>	Date (DD/MM/YYYY)	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

b. **Member’s Agreement** (To be completed for all contracts except SSAS) I, the Member/ Planholder named in Part 1 agree to the changes.

Signature	▶	<input type="text"/>	Date (DD/MM/YYYY)	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
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For a SSAS, all Trustees must sign the agreement. If there are more than 4 Trustees, please add the other Trustees’ signatures below.



Signature(s) required.

Part 6 – For completion by the financial adviser

(To be completed for Group Plans and Executive Pension Plans NOT written under Stanplan A only.)
I confirm that I have given the Trustees written advice in relation to this investment instruction.

Signature	▶	<input type="text"/>	Date (DD/MM/YYYY)	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
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Signature(s) required.

What happens next

We will carry out your instructions as soon as possible. Normally this means:

- Changes to existing funds – if Standard Life receives the request before 5 p.m. the switch will be processed using the fund prices that apply two working days later. If the request is received after 5 p.m. the switch will be processed using the fund prices that apply three working days later.
- Changes for future payments for pension contracts – if existing funds are being switched these changes will apply from the working day following the switch of existing funds. If existing funds are not being switched, and the request is received by Standard Life before 5 p.m. the changes will apply to payments made from two working days after the request is received by Standard Life. If the request is received after 5 p.m. the changes will apply to payments made from three working days after the request is received by Standard Life.

We will send you confirmation when the changes have been made.



Please keep a copy of the completed form for your files.

FOR OFFICE USE ONLY: Date/Time Received
<input type="text"/>

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Standard Life Assurance Limited is registered in Scotland (SC286833) at Standard Life House, 30 Lothian Road, Edinburgh EH1 2DH.

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