

# Investment Option Form

For completion by the Member (BLOCK CAPITALS)



When you join the Scheme, the contributions made into your Member's Account will be automatically invested in the default Lifestyle Strategy which is decided by Workers Pension Trust Trustee Limited.

You can, however, choose to invest your contributions in any one fund or a combination of the 5 funds available. This is known as the Freestyle Strategy.

**If you wish to choose your own investments please complete this form.**

Further information on the default Lifestyle Strategy, the Freestyle Strategy and funds available can be found in the Members section of our website at [www.workerspensiontrust.co.uk](http://www.workerspensiontrust.co.uk)

## PERSONAL DETAILS (Please complete)

Full Name: \_\_\_\_\_

Address: \_\_\_\_\_

Post Code: \_\_\_\_\_

National Insurance No: \_\_\_\_\_

Date of Birth: \_\_\_\_\_ (dd/mm/yyyy)

Email: \_\_\_\_\_

Telephone No: \_\_\_\_\_

## INVESTMENT OPTION

## PERCENTAGE

WPT Growth Fund

%

WPT Volatility Reduction Fund

%

WPT Capital Protection Fund

%

WPT Annuity Protection Fund

%

WPT Diversified Fund

%

Total = (Total must equal 100%)

%

## DECLARATION

I understand that these choices are being made entirely at my request and that the Trustee of the Scheme is not responsible for how this instruction may affect the ultimate value of my benefits under the Scheme. By selecting the investment proportions myself, I am adopting a Freestyle approach and I understand that I will not be included in the default Lifestyle Strategy. I understand that my selected allocation above will remain the same unless I make a switch request in future to alter these allocation percentages.

Signed (by member): \_\_\_\_\_

Date: \_\_\_\_\_

Name: (Block Capitals): \_\_\_\_\_

## STATEMENT ON DATA PROTECTION

The information and data which is provided by members will be held to enable Workers Pension Trust to administer and pay pension benefits. Full information on how we manage personal data is explained in our Privacy Policy which is available at [www.workerspensiontrust.co.uk/privacy-policy](http://www.workerspensiontrust.co.uk/privacy-policy).

Please return this form to:

**Workers Pension Trust**  
**4th Floor**  
**State Buildings**  
**2 Arthur Place**  
**Belfast**  
**BT1 4HG**