

# Investment Switch and Redirection Form

Please complete using BLOCK CAPITALS  
and tick(✓) where appropriate



You should complete this form if you wish to Switch your existing holdings and/or Redirect your future contributions or switch to the default Lifestyle Strategy. An explanation of these options is provided overleaf.

## PERSONAL DETAILS

Name:

National Insurance No:

Date of Birth:

(dd/mm/yyyy)

### What would you like to do?

- Switch existing holdings only** (please choose from the funds available below)
- Redirect future contributions only** (please choose from the funds available below)
- Both Switch existing holdings and Redirect future contributions** (please choose from the funds available below)
- Switch to default Lifestyle Strategy** (do not choose from the funds available below)

Investment Option	Percentage
WPT Growth Fund	%
WPT Capital Protection Fund	%
WPT Volatility Reduction Fund	%
WPT Annuity Protection Fund	%
WPT Diversified Fund	%
Total = (Total must equal 100%)	%

Signed (by Member):

Date:

## 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).

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

# Investment Switch and Redirection Form Notes

## Explanation of the options available

### Switch existing holdings only

The holdings held in your current investment options will be sold and the value redistributed in line with the percentage that you have indicated overleaf. Any contributions paid into your account after receipt of this completed form will continue to be invested in line with your previous investment options.

### Redirect future contributions only

The holdings held in your current investment options will remain invested where they are. Any contributions paid into your account after receipt of this completed form will be invested in line with the percentage that you have indicated overleaf.

### Switch existing holdings and Redirect future contributions

The holdings held in your current investment options will be sold and the value redistributed in line with the percentage that you have indicated overleaf. Any contributions paid into your account after receipt of this completed form will also be invested in line with the percentage that you have indicated overleaf.

Please note that if you switch or redirect your contributions you will no longer remain in the default lifestyle strategy and your investments will not be gradually switched as your retirement approaches.

### Switch to default Lifestyle Strategy

The holdings held in your current investment options will be sold and the value redistributed in line with the default Lifestyle Strategy. Any contributions paid into your account by your employer after receipt of this completed form will also be invested in line with the default Lifestyle Strategy.

## Charges

Two free switches are permitted per calendar year. All subsequent switches may be subject to an administration fee, at the discretion of the Scheme Trustees.

You should be aware that there can potentially be a cost associated with transferring between funds. This is embedded in the prices used by the investment managers when buying and selling units in their funds and therefore would not be shown on your annual benefit statement. The cost can be variable depending on market conditions and on the funds which you are switching between. However, it would typically be at most 0.7% of the value of the assets transferred but could be lower or could even result in a profit relative to the underlying value of investments depending on trading conditions on the day. Cash type funds do not incur any charges in switching.

If you have any queries about completing this form, please contact Workers Pension Trust on 0345 475 0555 or email [info@workerspensiontrust.co.uk](mailto:info@workerspensiontrust.co.uk)

It is recommended that you contact an Independent Financial Adviser if you are unsure about appropriate investment options for your retirement. If you need help finding a regulated independent financial adviser, you can visit the Financial Conduct Authority website at [www.fca.org.uk/consumers/finding-adviser](http://www.fca.org.uk/consumers/finding-adviser).