Change of investment Application form

This application form is for changing your investment choice.

It can be used with the following existing plans:

- **Talisman Personal Pension Plans, Executive Pension Plans, Free Standing AVC Pension Plans and Buyout Bonds**
- **Talisman Group Personal Pension Plans, Group Pension Plans and Continuation Pension Plans**
- **Talisman Retirement Options Plans**

Important information

Please read before completing this application form.

- Please use BLOCK CAPITALS and black ink when completing this form.
- For details of all the investment choices please refer to our website at royallondon.com
- We recommend you take financial advice before changing your investment choice, as selecting unsuitable investments may significantly reduce the value of your pension savings.
- If you need any help completing this form you can contact us on 0345 60 50 050 (Mon - Fri 8am - 6pm).
- Your completed form should be sent to us at **Royal London House, Alderley Park, Congleton Road, Nether Alderley, Macclesfield, SK10 4EL**

1 Personal information

This section should be completed by all applicants.

Member/planholder's name	
Plan number	
Scheme number (if applicable)	
Member/planholder's contact telephone number	
Member/planholder's email address	

2 New investment choice

This section should be completed to tell us what your new investment choice is.

You should tick one option only below and then complete the relevant part.

I would like to:

- Invest in individual funds from the fund range ☐ **Please now complete Part A only**
- Invest in a Retirement Investment Strategy ☐ **Please now complete Part B only**

Part A: Individual funds from the fund range

(i) Switch existing investments

Complete Table 1 below if you want to switch out of **some** of the individual funds you are currently invested in. If you want to switch out of **all** the funds you are currently invested in then tick this box instead. ☐

Buyout Bonds - Fund switches may be restricted. Please contact us if you need more information on this.

Complete Table 2 with details of the funds that you want your investments to be switched to.

Table 1: Funds to be switched from:

Fund manager & fund name	Percentage (%)

Table 2: Funds to be switched to:

Fund manager & fund name	Percentage (%)
Total	100%

Note: A market value reduction may be applied for switches out of the with profits Fund.

2 New investment choice continued

(ii) Future regular payments

If you are making future regular payments do you want your new fund selection as shown in Part A (i) Table 2 to apply to these payments as well? Yes ☐ No ☐ Not applicable ☐

If 'No' please complete the table below to tell us what individual funds you would like your future regular payments to be invested in. The percentage split must add up to 100%.

Fund name	Percentage (%)	Fund name	Percentage (%)
Total	100%	Total	100%

Part B: Retirement Investment Strategy

If you would like to invest in one of our Retirement Investment Strategies, you'll need to tick one box within each of the sections below.

Please tick to confirm what you would to target:

Target cash ☐

Target annuity ☐

Target drawdown ☐

Please tick to confirm your risk profile:

Balanced ☐

Cautious ☐

Moderately Cautious ☐

Moderately Adventurous ☐

Adventurous ☐

You cannot invest the Income Drawdown part of your Talisman Retirement Options Plan in a Retirement Investment Strategy.

Note: Your targeted investment choice and your risk profile will affect how the name of the retirement investment strategy will appear. For example if you chose to target drawdown and you have a balanced risk profile, this will appear as 'Balanced Lifestyle RIS (Drawdown)' or if you choose to target an annuity, you'll see 'Annuity' within the name of your lifestyle strategy and if you choose 'Cash', this will appear with just the strategy name.

3 Declaration

The member/planholder, trustees or financial adviser should complete this section.

If the member/planholder and/or trustees are giving the authorisation for the change in the investment selection then only Part (i) below should be completed. If the financial adviser is changing the investments on behalf of the member/planholder then only Part (ii) below should be completed.

(i) Member/planholder and/or trustee authorisation

I apply to change the investment choice according to the instructions given in section 2.

I confirm that I have read the relevant factsheets for the investments I have chosen. I understand that additional fund management charges may apply to the investments I have selected.

Member/planholder's signature   **Date** D D M M Y Y Y Y

Must be signed for all plan types except Talisman Executive Pension Plans and Crest Growth Pension Plans.

and/or

Trustee's signature   **Date** D D M M Y Y Y Y

Official position

Must be signed for Talisman Executive Pension Plans and Crest Growth Pension Plans only.

(ii) Financial adviser authorisation

Financial adviser's signature   **Date** D D M M Y Y Y Y

FCA reference number

Royal London agency number

Contact telephone number

Note: If signed by a financial adviser on behalf of the member/planholder and/or trustees, Royal London reserves the right to request a letter of instruction signed by the member/planholder and/or trustees giving details of the investments to be made. Alternatively, written authority to act upon the financial adviser's instructions can be provided by the member/planholder and/or trustees. Royal London reserves the right not to accept instructions without this authority. **Please note it is the financial adviser's responsibility to ensure that instructions sent to Royal London correctly reflect the member/planholder's and/or trustee's wishes.**

Royal London
royallondon.com

We're happy to provide your documents in a different format, such as Braille, large print or audio, just ask us when you get in touch.

All of our printed products are produced on stock which is from FSC® certified forests.

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