Request to amend investment choices and/or Target Retirement Age (TRA)

experian

for members of the Experian Retirement Savings Plan

This form should be used if you want to...

- Change your investment choice
- Amend your TRA

Save time by doing this online.
Simply log in to your online account at
www.experian.co.uk/retirementplan

Please remember that:

- You must invest all of your contributions in either the 'Own Choice' or 'Lifestyle' options
- **Both** part 1 and part 4 must be completed in **all** cases, and then **either** part 2 or part 3, not both.

Part

1

Personal details

Please complete the following in BLOCK CAPITALS, using blue or black ink.

Title: Mr/Mrs/Miss/Ms/Other* ______________ Surname ______________

Forename(s) ______________

Home address ______________

______________ Postcode ______________

Date of birth D D M M Y Y

Employee number

NI Number

*Delete whichever do not apply

Please remember to complete all relevant parts of this form, including the declaration in part 4.

Part

2

'Own Choice' funds

I wish my retirement savings to be invested in the 'Own Choice' funds of the Experian Retirement Savings Plan as follows:

Name of Fund	Please complete as appropriate
Diversified Assets Active Fund	%
Global Equities Passive Fund	%
Global Equities Active Fund	%
Overseas Equities Passive Fund	%
UK Equities Passive Fund	%
UK Equities Active Fund	%
Index - Linked Gilts Passive Fund	%
Cash Active Fund	%
Shariah Passive Fund	%
Pre-Retirement Passive Fund	%
Corporate Bonds Passive Fund	%
Total	100%

The above instruction will apply to:

Either

Please tick as appropriate

All previous and future payments to the Experian Retirement Savings Plan ☐

Or

Only future payments to the Experian Retirement Savings Plan ☐

This form does not cater for all instructions. You should therefore contact the Experian Pensions Team if you:

- Would like your new investment choice to apply to previous contributions only; or
- Would like to invest your Basic Normal Contributions (BNCs) and Additional Voluntary Contributions (AVCs) in different funds.

Part

3

Lifestyle options (not to be completed if you have already completed part 2)

I wish my retirement savings under the Experian Retirement Savings Plan to be invested in (please only select one of the following):

Please tick as appropriate

The Adventurous Lifestyle Option ☐

Or

The Lifestyle Option ☐

The above instruction will apply to **ALL PREVIOUS AND FUTURE PAYMENTS** into the Experian Retirement Savings Plan in respect of (please select one or both of the following):

My BNCs ☐

My AVCs ☐

TRA - not to be completed if you are within five years of TRA

I hereby confirm that my TRA for the purposes of the Lifestyle options is as follows:

TRA D D M M Y Y

1) If you have chosen a Lifestyle option this has to apply for all contributions (past and future). Members are not permitted to select different Lifestyle options for previous and future contributions.
2) If you are within five years of your TRA you should contact Capita about how you intend to take your benefits at retirement.
3) If you're a Lifestyle member and are changing your TRA, your investments will be reallocated as follows, in line with the number of years until your new TRA:
   - If you have chosen an earlier TRA, more of your retirement savings will be moved to lower-risk funds.
   - If you have chosen a later TRA, more of your retirement savings will be moved to higher-risk funds.
4) Your TRA must be age 55 or above.

Part

4

Declaration (to be completed in all cases)

I understand that this instruction will be carried out on the next available monthly switching date for the Plan as a whole and I will receive confirmation once the transaction is complete. I understand that in changing my TRA, my investments will be reallocated in line with the number of years until my new TRA.

Form completed by (CAPITALS) ________________________________

Signature ________________________________

Date D D M M Y Y

Visit **www.experian.co.uk/retirementplan** for more information on BNCs, AVCs, SMART Pensions and investment options.

Please return your completed form to:

Experian Pensions Team
Capita Employee Benefits
Hartshead House
2 Cutlers Gate
Sheffield
S4 7TL

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