

The People's Pension

Choosing where to invest your pension savings

By completing this form, you are choosing to change the investment of your existing pension savings and any future contributions.

Your personal details Please fill in all the details below.

Title (Mr/Mrs/Miss/Ms) Surname

Forename(s)

Address

Town County

Post code Email address

Telephone numbers:

Day Evening Mobile

Marital status Occupation Date of birth

Please include your customer number if you can. You can usually find this at the top of any letter we have sent you.

Customer number

Where I want my pension savings invested

You can decide where your money is invested. You have a choice of three investment profiles, 'cautious', 'balanced' and 'adventurous' (each have a different level of risk) or you can choose the funds your money is invested in yourself (self-select). If you don't tell us where you'd like your pension savings invested, we'll automatically invest them in the 'balanced' investment profile, which is our default investment profile.

Our investment profiles gradually and automatically move your pension savings into lower-risk investments as you near retirement. This process is known as a 'glidepath' and it begins 15 years before your selected retirement age. The glidepath does not apply under the self-select option.

All you need to do is let us know which investment profile you'd like your pension savings invested in by completing and returning this form. If you wish to use the self-select option, please do not fill in this form. Instead go to your Online Account to find out more about the funds available and to make your choice.

Investment profile	Please tick one option
Cautious	<input type="checkbox"/>
Balanced	<input type="checkbox"/>
Adventurous	<input type="checkbox"/>

You can self-select and manage your own investments using your Online Account.
Set up or log on at
thepeoplespension.co.uk/manage-account.

Additional information

You can always change your mind in the future and choose a different profile or, for those with more confidence in investing, self-select your funds – you can do this in your Online Account.

It's important you know that choosing a different investment profile could affect where your pension savings are invested by moving them back or forward on the glidepath and into higher or lower-risk funds.

Profit for people

the
people's
pension

Your Declaration

I authorise the Trustee to invest my pension savings with The People's Pension and any future contributions in the investment profile I have chosen above. I have not asked for advice or received advice from any representative of The People's Pension Trustee Limited or its agents.

Please sign and date

Signature:

Date:

Please return to: Freepost THE PEOPLES PENSION

It'll help to keep a copy of this completed form for your own records. We'll write to let you know once we've processed your form and updated your records.

Need another form? You can download copies from our Resource Library on our website thepeoplespension.co.uk/resource-library. Or you can call us on **0300 2000 555** and we'll send you the form.