

ICI Pension Fund AVC – Change of Investment Form



Please fill in this form if you wish to change how your additional voluntary contributions are invested. You may wish to seek independent financial advice before doing so.

Please use BLOCK CAPITAL letters

Personal details

Full Name
National Insurance Number
Home Address

Please note this transfer will apply to all your AVCs unless you tick the box below to say that any With-Profits investments should not be transferred. The allocation you set below will determine your future investment strategy

Do not transfer any AVCs that I hold in a With-Profits fund (please tick)

Option 1 (Self-select funds)

Transfer my AVCs to the following self-select fund(s): (please tick)

AVC "self-select" fund range	Percentage allocation
Clerical Medical Cash	%
CM BlackRock Over 5 years Index-Linked Gilt Index	%
CM BlackRock Over 15 Years Gilt Index	%
CM BlackRock UK Equity Index	%
CM BlackRock World (Ex UK) Equity Index	%
Total = 100%	

Please make sure the percentages add up to 100%.

Option 2 (Balanced Lifestyle option)

Transfer my AVCs to the CM BlackRock Balanced Lifestyle fund: (please tick)

Selected retirement age

PLEASE NOTE: It is not possible to split your investment between the Clerical Medical self-select fund range and the CM BlackRock Balanced Lifestyle investment option. You must choose either Option 1 or Option 2.

However, if you currently hold the Clerical Medical With-Profits Fund or the Equitable Life With-Profits Fund, you can retain these investments and invest in the Lifestyle option.

Selected Retirement Age

The selected retirement age is used with the lifestyle strategy to gradually switch investments to less risky funds as you approach retirement. You can choose any age between age 55 and age 75. It is usually the date you want to start taking your AVC benefits but is for investment purposes only; you don't have to receive your benefits from this date and can change it at any time.

Your agreement

The Data Protection Act 1998 requires that your consent is obtained before information can be processed about you.

The Trustee is a data controller of the ICI Pension Fund and needs to hold and process data about you to administer and operate the Fund. To assist the Trustee with this, and to provide products and services for the benefit of the Fund, the Trustee uses third parties such as actuaries, investment fund managers, advisers, insurers and administrators with whom your data may be shared.

By completing and returning this form, you give your consent to the use of your information for these purposes.

Your signature

Date

When you have filled in this form, please send it to ICIPF, PO Box 545, Redhill, Surrey RH1 1YX