

# My Money Pension Account

## Change of investment funds form

NGS105/F MM30359 03/2019

**Important notes:** Please complete this form using BLOCK CAPITALS throughout and tick the boxes where appropriate.

Member's account number

GS2722849

Member's name

BENEDICT JAMES WINCHESTER

**Please complete the appropriate boxes with the changes to your investment funds.**

**Please complete using whole percentages only. The total must add up to 100%.**

- To make changes to your investment programme (**lifetime** or **lifestyle**), please complete the boxes in the 'Your investment programme' section.
- **If your instructions are unclear or the form has not been signed and dated, we will be unable to make the changes. We will contact you if this is the case.**

Up-to-date fund information is available online at [www.avivamymoney.co.uk](http://www.avivamymoney.co.uk) or by contacting us.

The maximum number of funds that you can make contributions into is ten.

When completed, please return this form to: **Aviva, PO Box 2282, Salisbury SP2 2HY.**

### Switch out instructions – for existing funds only

Please complete this section if you wish to switch your existing personal fund to a new investment fund choice. Please indicate the percentage to be switched out of each fund in which your contributions are currently invested, in accordance with the rules of the scheme.

- Only whole percentages can be specified.

Current fund name	Percentage of fund (whole % only)
Av MyM CISCO GROWTH / BALANCED RISK	100 %
CASH	100 %
	%
	%
	%
	%
	%
	%
	%
	%
	%



Retirement  
Investments  
Insurance  
Health

## Proceeds of switch out to be invested in

Please complete this section to indicate the new investment funds you wish your existing personal fund to be switched into. Please indicate the percentage to be switched into each fund.

- Only whole percentages can be specified and the percentage total must equal 100%.
- The maximum number of fund choices is 10.

New fund name	Percentage of fund (whole % only)
AV MYM LEGAL & GENERAL (PMC) ETHICAL UK EQ 10x	25 %
VANGUARD ESG DPWOALCP EQ 10 A £	30 %
L&G FUTURE WORLD ESG UK INDEX I	15 %
L&G FW ESG PVLPO 10x I Acc	15 %
ASI MMgr ETHICAL PFL I Acc	15 %
	%
	%
	%
	%
	%
Total 100%	

## Redirection of future contributions

Please complete this section if you wish to redirect your future contributions. Please indicate the percentage amount to be directed into each fund.

- Only whole percentages can be specified and the percentage total must equal 100%.
- The maximum number of fund choices is 10.

New fund name	Percentage of fund (whole % only)
	%
	%
	%
	%
	%
	%
	%
	%
	%
	%
Total 100%	

Please note the total of the funds in the tables above cannot exceed 10 i.e you cannot switch into 10 funds and redirect into a different set of 10 funds.

## Your investment programme

Would you like to choose a **lifetime** investment programme?

Yes ☐ No ☒

If Yes, please confirm the name of the investment programme you wish to choose.

Do you want to choose a **lifestyle** investment programme?

Yes ☐ No ☒

If Yes, please insert the name of the **lifestyle** investment programme.

If you currently have an active investment programme and you would like to exit it, please tick this box.

☐

### Investment programme end date

Your account may allow you to choose when your investment programme finishes, known as your Investment Programme End Date (IPED). If you are unsure about whether your scheme allows this please contact us.

If you have an investment programme and your scheme allows you to choose a different date to your Selected Retirement Date (SRD), please specify the date at which you wish your programme to end in the box below. The IPED should coincide with your birthday.

Your chosen IPED (should be the same day and month as your birthday, DD MM YYYY)

1	7	0	3	2	0	6	7
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## Important notes

Please note that if you are exiting a **Lifetime** investment programme and are not replacing it with a new one, you must provide instructions for the redirection of future contributions. If you wish you can also switch your existing holdings.

If you have an active **Lifetime** investment programme, you cannot submit instructions to switch or redirect funds, or apply a **Lifestyle** investment programme.

Aviva cannot be held responsible for forms sent but not received.

If you are using Income Drawdown, please note that investment programmes are not available and you will not be able to make your own investment choice.

Fund Supermarket and Alternative Investment transactions cannot be completed via this form. If these are available to your scheme and you wish to make a transaction, please complete by logging into your My Money account at [www.avivamymoney.co.uk](http://www.avivamymoney.co.uk).

Up-to-date fund information is available online at [www.avivamymoney.co.uk](http://www.avivamymoney.co.uk) or by contacting us. The maximum number of funds that you can make contributions into is ten.

When completed, please return this form to: **Aviva, PO Box 2282, Salisbury SP2 2HY.**

## Declaration

I confirm that I am entitled to give this authorisation for the above request and I understand that the instructions will operate in accordance with the current terms and conditions for fund variation.

Your signature

Your name (please print)

Your preferred contact number

Date

1	4	0	1	2	0	2	1
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### Signatures

This request must be signed by either:

- 1 The account holder
- 2 Someone authorised by the account holder to give instructions on their behalf, such authorisation being given in a written form of authority lodged with Aviva

## How to contact us

Your financial adviser will normally be your first point of contact. If you have any questions, you can phone, email or write to us.

-  Call us on **0345 604 9915** at the following times:  
Monday to Friday between 8am and 5.30pm.  
We may record calls to improve our service. Calls may be charged and these charges will vary; please speak to your network provider.
-  Email us at **[mymoney@aviva.com](mailto:mymoney@aviva.com)**.
-  Write to us at  
**Aviva**  
**PO Box 2282**  
**Salisbury**  
**Wiltshire SP2 2HY**
-  For further information on any of our products and services, visit our website  
**[www.avivamymoney.co.uk](http://www.avivamymoney.co.uk)**.

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Telephone 0345 602 9189 – calls may be recorded.

**[www.aviva.co.uk](http://www.aviva.co.uk)**

