

CHANGE YOUR INVESTMENTS

Church Administrators Pension Fund – Defined Contribution Section

Please use this form to tell us how you would like to change the way your pension pot is invested. **We aim to complete switches in 5 days.**

Please complete section 1, then 2 **or** 3, **and** 4 and email this to us at pensions@churchofengland.org

1: Your personal details

| | |
|-----------------------------------|--|
| Full name: | |
| Date of birth: | <div style="display: flex; justify-content: space-between; padding: 0 10px;"> <div style="border: 1px solid black; width: 20px; height: 20px;"></div> <div style="border: 1px solid black; width: 20px; height: 20px;"></div> <div style="border: 1px solid black; width: 20px; height: 20px; text-align: center; line-height: 20px;">/</div> <div style="border: 1px solid black; width: 20px; height: 20px;"></div> <div style="border: 1px solid black; width: 20px; height: 20px;"></div> <div style="border: 1px solid black; width: 20px; height: 20px; text-align: center; line-height: 20px;">/</div> <div style="border: 1px solid black; width: 20px; height: 20px;"></div> <div style="border: 1px solid black; width: 20px; height: 20px;"></div> <div style="border: 1px solid black; width: 20px; height: 20px;"></div> <div style="border: 1px solid black; width: 20px; height: 20px;"></div> </div> |
| National Insurance number: | |

2: Journey options

I wish my contributions to be invested in (please tick **ONE** option):

Annuity Journey

☐

Drawdown Journey (*Default option*)

☐

My target retirement age is:

This is the age you might retire. You can pick any age after 55.
If you leave this blank, we will assume age 65.

3: Pick your own investments

Complete this section if you would like to pick your own investments

Responsibly invested equities

FTSE4Good UK equities (L&G FTSE4Good UK Equity Index Fund)

 %

FTSE4Good Developed equities (L&G FTSE4Good Developed Equity Index Fund)

 %

Unrestricted equities

UK equities (L&G UK Equity Index Fund) %

Global (overseas) equities (L&G Overseas Equity Consensus Index Fund) %

Global (UK and overseas) equities (L&G Global Equity (30:70) Index Fund) %

Gilts and Bonds

Index-linked gilts (L&G Over 5 Years Index-Linked Gilts Fund) %

Fixed interest gilts (L&G Over 15 Years Gilts Index Fund) %

Corporate bonds (L&G AAA-AA-A Corp Bond All Stocks Index Fund) %

Inflation sensitive

Annuity Purchase (L&G Future World Inflation Sensitive Annuity Aware Fund) %

Property

Property Fund (L&G Managed Property Fund) %

Cash

Cash (L&G Cash Fund) %

4. Switch or keep your existing freestyle investments

I wish to keep my existing investments where they are and only invest future contributions in my new investment choice

I wish to switch my existing investments so all my investments are in my new investment choice

Signed:

Date:/...../.....