**TO BE COMPLETED BY THE EMPLOYEE**

Once completed this form should be sent to your Pension Contact for forwarding to Buck at: The Emerson UK Pension Plan, Buck (Manchester), PO Box 324, Mitcheldean, GL 14 9BJ.

|  |  |
| --- | --- |
| **Part A** | **Personal Details** |

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
|  |  |  | | | |  |
| Full Name: |  |  | | | |  |
|  |  |  |  |  |  |  |
| Date of Birth: |  |  |  | NI Number: |  |  |
|  |  |  |  |  |  |  |
| Date Joined Company |  |  |  | Date Joined the Plan |  |  |
|  |  |  |  |  |  |  |
| Target Retirement Age: |  |  |  | E-mail: |  |  |
|  |  |  |  |  |  |  |
| Address: |  |  | | | |  |
|  |  |  |  |  |  |  |

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| **Part B** | **Your Investment Options** |

Please invest my funds as follows by either choosing one of the two Lifestyle options:

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
|  |  |  |  |  | **Tick to Select** |  |
|  | Legal & General |  | Emerson Default Lifestyle Fund |  |  |  |
|  | **Or** |  |  |  |  |  |
|  | Legal & General |  | Emerson Cash Lifestyle Fund |  |  |  |
|  |  |  |  |  |  |  |

Or by choosing the percentage of your contributions you wish to invest in the specific Legal and General funds

|  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- |
|  | **Investment Fund** |  | **Percentage** |  | **Investment Fund** |  | **Percentage** |  |
|  | All Stocks Gilts Index |  | % |  | UK Equity Index |  | % |  |
|  |  |  |  |  |  |  |  |  |
|  | Cash |  | % |  | World (ex UK) Equity Index |  | % |  |
|  |  |  |  |  |  |  |  |  |
|  | Over 5 Y Index Linked Gilt |  | % |  | Global Equity (30/70) Index |  | % |  |
|  |  |  |  |  |  |  |  |  |
|  | Pre Retirement |  | % |  | AAA\_AA\_A Corporate Bond Index |  | % |  |
|  |  |  |  |  |  |  |  |  |
|  | Diversified Growth |  | % |  | **TOTAL** |  | **100%** |  |
|  | **Unless a form is received contributions will be invested in the default lifestyle investment option** | | | | | | | |

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| **Part C** | **Former Opt Out** |

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|  | | Please Tick | | |  | |
| I am rejoining the Plan after having previously been a member of the Emerson UK Pension Plan | | **YES** |  | **NO** |  |  |
|  | |  |  |  | | |
| **Part D** | | **Lifetime Allowance** | | | | | | |

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
|  | Please Tick | | |  | |
| I hold HMRC Primary or Enhanced Protection for my Pension Benefits. | **YES** |  | **NO** |  |  |
|  |  |  |  | | |

|  |  |
| --- | --- |
| **Part E** | **Your Contribution Rate** |

|  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- |
| Please indicate the level of contributions to be paid, expressed in percentage terms. | | | | | | | | |
|  |  |  |  |  |  |  | | |
|  | **Your Regular Contribution** |  | **Employer Regular Contribution** |  | **Additional Voluntary**  **Contributions\*** | | | |
|  | % |  | % |  | % | **or** | £ |  |
|  |  |  |  |  |  |  | | |
| \* Contribution scales will be confirmed by your on site Pension or HR Contact | | | | | | | | |

**Contributions will be deducted under the Emerson SMART Contribution Arrangement.**

**If you wish to opt-out please tick here**

|  |  |
| --- | --- |
| **Part F** | **Member Declaration** |

I confirm I wish to join the Emerson UK Pension Plan.

I understand that the above information will be used for operating the Plan in my interests, and as such it may be made available to third parties authorised by the Trustee of the Emerson UK Pension Plan to process my data. I have been made aware of my rights under the Data Protection Act as outlined in the Plan Booklet.

**Signature: Date:**

**Name: Tel No: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

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| **Part G** | **Site Pension Contact Statement** |

I confirm that the member’s personal information and contribution rates have been checked to our records and are correct.

**Plan Reference Code \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Life Assurance YES / NO**

**Signature:**  (To be signed by an authorised Pension/HR Contact)

**Name: Date:**

**The information provided will be processed by Buck for purposes only associated with the Emerson UK Pension Plan and will be used in accordance with it policies and the Trust Deed & Rules and the General Data Protection Regulation.**