

Investment alteration request

Please use black ink and CAPITAL LETTERS or tick ☒ as necessary.

Any corrections must be initialled. Please do not use correction fluid as this will invalidate your application.

About this form

This form can be used to

- change your investment fund selection
- add or cancel a Lifetime Investment Profile

To ensure you make a fully informed decision please read the Key Features Document as this will provide you with important information regarding the key risks and benefits of the product to help you make a decision.

Please also read your fund guide, available at pru.co.uk/pdf/CPTS0015.pdf, as this will provide you with full details of the funds available, their objectives, Prudential's risk rating of these funds and the charges and costs to help you select the funds suitable for your needs.

Please read the important notes below before you start to complete this form.

Part 1 – Important notes

1. You can choose to have investments in a maximum of 20 funds (19 if your plan includes compulsory investments in the With-Profits Fund due to Guaranteed Minimum Pension (GMP)) unless a Lifetime Investment Profile applies.
2. Once an investment switch has been processed it cannot be cancelled.
3. Re-allocation of existing investments to the With-Profits Fund is not allowed if you are within three years of your Normal Retirement Date and, if chosen, will instead be invested in the Cash Fund.
4. GMP value must be invested in the With-Profits Fund if this was required when the plan was set up.
5. Lifetime Investment Profiles do not apply to With-Profits investments.
6. If you take money out of the With-Profits Fund, we may make an adjustment to your fund value if the value of the underlying assets is less than the value of your plan including all bonuses. This adjustment is known as a Market Value Reduction (MVR). It is designed to protect investors who are not taking their money out and its application means that you get a return based on the earnings of the With-Profits Fund over the period your payments have been invested. We apply the MVR to your plan value including regular and final bonuses. We do not apply an MVR at your Normal Retirement Date, or in the month leading up to your Normal Retirement Date, or on any claims due to death.
7. The value of your investment can go down as well as up so you might get back less than you put in.

Part 2 – Investor's details

Investor

Plan number

National Insurance number

If you have more than one Prudential Company Pension Transfer Plan, do you want this request to apply to all of your Company Pension Transfer Plans?

Yes ☐

No ☐

If **No**, this request will be applied only for the plan number you completed above.

I request the revised investment strategy as detailed in this form.

Part 3 – Target investment strategy

Complete this section to specify your target percentage in each investment fund selected. We will calculate the percentage of units to be cancelled to meet your target investment strategy.

(Do **not** complete this section if you want to specify your exact requirements on the percentage(s) of existing investments to be cancelled – instead complete the detailed fund selection in Part 4.)

Fractions of 1% should not be used.

Fund	Target %
	%
	%
	%
	%
	%
	%
	%
	%
	%
	%
	%
	%
	%
	%
	%
	%
	%
	%
	%
	%
Total	100%

Part 4 – Detailed fund selection

Complete this section to specify your exact requirements on:

- the percentage(s) of existing investments to be cancelled and the percentage(s) of cash realised to be applied to the revised fund selection.

Fractions of 1% should not be used.

A maximum of 20 funds can be used for investment at any one time.

Existing investments

[illegible]

Application of existing investments

Fund	% of cash realised to be applied	
		%
		%
		%
		%
		%
		%
		%
		%
		%
		%
		%
		%
		%
		%
		%
		%
		%
		%
		%
		%
		%
Total	100%	

Part 5 – Lifetime Investment Profiles

Complete this section only if you want to add or cancel a Lifetime Investment Profile.

These options do not apply to With-Profits investments.

Do you want to add/cancel a Lifetime Investment Profile?

Add ☐ tick only one box
Cancel ☐

If you do want to add a Lifetime Investment Profile choose one of the following options:

Lifetime Investment Profile targeting **retirement options**

☐

Lifetime Investment Profile targeting **an annuity**

☐

Lifetime Investment Profile targeting **100% cash**

☐

Lifetime Investment Profile targeting **drawdown**

☐

How we use your personal information

For a copy of our latest Data Protection Notice, please visit pru.co.uk/mydata. This details how and why we use your personal information (including any sensitive personal information), who we may share it with and your rights around your personal information. Alternatively, you can request a hard copy to be sent to you by writing to **The Data Protection Officer, Customer Service Centre, Lancing BN15 8GB**.

Please note that we collect personal information from you that is necessary for us to either provide you with the product or service you've requested or to comply with statutory or contractual requirements. Unfortunately if you don't provide all of the information we require this may mean we are unable to provide our products and services to you.

For your own benefit and protection, you need to read carefully the documentation provided before signing this form. You also need to read carefully any further documentation provided to you in the future. If there is anything you do not understand, please ask us for further information.

Signature

Date

D	D	M	M	Y	Y	Y	Y
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Prudential use only

Reference

Date

CHWP