Pru
part of M&G plc

Investment alteration request form

Please use black ink and write in CAPITAL LETTERS or tick ✓ as appropriate. Any corrections must be initialled. Please do not use correction fluid as this will invalidate your Application.

About this form

This investment alteration request form is for use with Income Drawdown and Phased Retirement Plans only.

If you want to alter the investment strategy of other Premier, ex Scottish Amicable and ex M&G personal pensions, you should complete a Personal Pension Investment Alteration Request (ref P995).

This form can be used – to alter investment strategy
– for Income Drawdown plans to confirm a specific investment fund for Drawdown.

- Once an investment switch has been processed it cannot be cancelled. Re-allocation of existing investments into the With-Profits Fund is not permitted if you are over age 72. If you are over age 72, any portion selected for investment in the With-Profits Fund will instead be invested in the Cash Fund.
- Any Switching Charges will be deducted before application of the cash.

The following investment funds are fully described in our fund description brochure.

Cash	Japanese	Managed
Equity	M&G Episode Growth	North American
European	M&G Property Portfolio	Pacific Markets
International	M&G Smaller Companies	With-Profits

In addition the following funds are available for plans with start dates after 1 October 1997.

Dynamic Focused 0-30 Portfolio	M&G Gilt + Fixed Interest Income	Managed Distribution
Invesco Perpetual Managed Growth	M&G Global High Yield Bond	Newton Global Equity
M&G Corporate Bond	M&G Index Tracker	Newton Multi-Asset Balanced
M&G Dividend	M&G Managed Growth	UK Equity & Bond

The Management Charge may not, in future, be taken in the way described in your plan booklet. However, the total Management Charge taken will not be greater than the corresponding figure shown for the relevant fund in our table of Management Charges. Details are available on request.

Part 1 – Personal details

Forename(s) ____________ Surname ____________

Plan Number ☐☐☐☐☐☐☐☐

National Insurance number ☐☐☐☐☐☐☐☐☐

If this request is to apply to all your Flexible Retirement Portfolio plans please tick the box. ☐
(Note – If the box is not ticked this request will apply to the above plan only)

Part 2 – 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 Part 3 – Detailed fund selection.

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

If Part 2 is completed, do not complete Part 3.

Fractions of 1% should not be used.

Units may not be held in more than six funds per plan at any time.

Fund	Target %
Total	100%

Part 3 – 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.

Units may not be held in more than six funds per plan at any time.

Fund	% to be cancelled

Fund	% of cash realised to be applied
Total	100%

Part 4 – Fund selection for Income Drawdown

If you selected regular withdrawals for Drawdown, units will be realised evenly across the investment funds you selected, in proportion to the individual fund values, unless you confirm otherwise.

Do you want units realised from a particular fund, leaving other investment funds intact? Yes ☐ No ☐

If **Yes**, which fund?

Part 5 – Declaration

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

How we use your personal information

For a copy of our latest Data Protection Notice, please visit www.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 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.

Signature

Date D D M M Y Y Y Y

Prudential Use Only

Ref

Received Date: D D M M Y Y Y Y

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