Pru
part of M&G plc

Investment alteration request

How to fill out this 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.

Please note: Redirection of contributions to Unit Linked Funds is only available if you have already paid regular contributions into one of these.

About this form

This form can be used to

- alter specific fund choices, **or**
- select a Lifestyle option.

Plan number

Prudential Personal Pension Plan number

Part 1 – Member's details

Title Mr ☐ Mrs ☐ Miss ☐ Ms ☐ Dr ☐ Other

Full Forenames

Surname

National Insurance number

Part 2 – Fund selection

If you redirect all your contributions into With-Profits Funds you will be unable to redirect future contributions back into any of our Unit Linked Funds.

Complete this section to specify exact requirements on the:

- percentage(s) of existing investments to be cancelled
- percentage(s) of cash realised to be applied to the revised fund selection
- redirection of future regular contributions
- Selected Retirement Date for reallocated investments and future contributions

Fractions of 1% can't be used.

Fund(s) from which "switch" is to be made and % to be "switched". If you don't tell us the amount, we'll assume 100%.		Fund(s) into which "switch" is to be made and % split if into more than one fund. If you don't give us the percentage, we'll split the amount available equally between the funds chosen.		Future Regular Contributions (% of total contribution)	
Fund	%	Fund	%	Fund	%
				Total	100%

Part 3 – Selected retirement date

Date 0 1 M M Y Y Y Y

(This will apply to reallocated investments and future regular contributions. Any investments remaining in With-Profits funds will retain their current Selected Retirement Date.)

Your Fund Guide is available at **pru.co.uk/pdf/INVB6572.pdf** or on request.

Part 4 – Lifestyle options

Details of the lifestyle options are contained in your Fund Guide. Lifestyle options do not apply to With-Profits funds.

Please tick one option only. Your selection will apply to the whole of your plan.

Lifetime Investment Profile targeting **retirement options** ☐

Lifetime Investment Profile targeting **an annuity** ☐

Lifetime Investment Profile targeting **100% cash** ☐

Lifetime Investment Profile targeting **drawdown** ☐

Notes

- Once an investment switch has been processed it cannot be cancelled.
- Details of all funds currently available are contained in the fund guide available on **pru.co.uk** or on request.
- We will sell and buy relevant units on the Unit Price Date(s) applicable following receipt of all the information we require.
- If all, or any part of your Plan is invested in the With-Profits Fund, and the pension is transferred, switched to another fund or early retirement is taken, we may apply an adjustment called a Market Value Reduction (MVR). If an MVR applies you may not receive any final bonus, or the full value of the regular bonus and you may even get back less than you had invested. However, the amount you get back from your Plan will not be less than the current market value of the assets underlying your Plan. MVRs are designed to protect investors not taking their money out of the fund. Full details of our current practice of applying an MVR can be found in the Key Features document and MVR – a clear explanation document reference PRUS6165.
- Re-allocation of existing investments (or redirection of future contributions) to the With-Profits Fund is not allowed if you are within five years of the State Pensionable Date. Switches from the Deposit Fund to the With-Profits Cash Accumulation Fund are not allowed at any time.
- If you only pay regular contributions into With-Profits you are unable to redirect future contributions into any of our Unit Linked Funds.
- It is not currently our practice to make a charge for any fund switches (including lifestyle options), however, subject to adequate notice being given, we reserve the right to do so at any time.

How we use your personal information

For a copy of our latest Data Protection Notice, please visit **pru.co.uk/mydata-cp**. 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.

Declaration

I have read the Notes above, and request either the revised fund selections stated, or the lifestyle option selected, in this form.

Member's signature

Date

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