

C&J Clark Pension Fund

Select Your Investments

You can use this form to select and change how you invest your Pension Account. More details of the available investment options can be found in the 'Plan 18 and Additional Voluntary Contribution (AVC) Investment Guide' in the Pension Fund website <https://www.clarkspensions.co.uk/>.

Hymans Robertson LLP cannot advise you on your investment choices. If you're unsure how to invest your Pension Account you should consider talking to an Independent Financial Adviser (IFA). You can find an IFA at <https://www.unbiased.co.uk/>. Please note that an IFA may charge for their service.

How to complete this form

- Check your details by logging into the Fund website <https://secure.clarkspensions.co.uk> or contact the plan administration team on the contact details at the end of this form.
- Do you want to change the funds you invest in? If so, please complete 'Part A' below
- Do you want to update your Target Retirement Age? If so, please complete 'Part B' below
- Remember to sign your confirmation in Part C so we can change your investments

To begin, please complete your details below:

Your Name:	
Your National Insurance number:	
Are your address details up to date? If not, please let us know your updated address:	
Your email address:	

Part A: Do you want to update the funds you invested in?

If you want to invest your Pension Account in a different option, please let us know by ticking in the relevant box below (only tick one):

I want to invest in the Lifestyle Fund

Or

I want to invest my Pension Account in the below self-select options. If you select a self-select option, you cannot also select the Lifestyle Fund and all of your funds will be moved to the self-select option.

Fund name	Percentage (%)
All World Equity Index Fund	%
World (ex UK) Equity Index Fund	%
UK Equity Index Fund	%
Ethical Global Equity Index Fund (includes charges)	%
Global Emerging Markets Fund	%
Only available to select for Additional Voluntary Contributions (AVCs)	
Managed Property Fund	%
Diversified Fund	%
Retirement Income Multi-Asset Fund	%
Corporate Bond Over 15 Year Index Fund	%

Over 5 Year Index-Linked Gilts Fund Only available to select for Additional Voluntary Contributions (AVCs)	%
Cash Fund	%
Total (please ensure the percentage totals 100%)	%

Part B: Do you want to change your Target Retirement Age?

I want to change the age that the Lifestyle Fund targets for me to retire at to:

I understand this will update the way that my funds are invested as I approach the target age. Details can be found in the 'Plan 18 and AVC Investment Guide' in the Pension Fund website at <https://www.clarkspensions.co.uk/>.

Part C: Declaration

I understand that the choice of investments under the Pension Fund is entirely mine. In addition, I accept that, although the Trustee reviews the choice of funds periodically with their advisers, they cannot guarantee either the performance of individual funds, managers or value of the Pension Account or the benefits it will ultimately purchase.

Signed: _____ Date: _____

Please return this form to Hymans Robertson LLP, the Pension Fund administrators via email or post:

Email: Clarks@hymans.co.uk

C&J Clark Pension Fund
Hymans Robertson LLP
45 Church Street
Birmingham
B3 2RT

Need further information?

For more information on your investment choices please contact the scheme administrators on 0121 212 8122 or email using the email address above.