

## 100+ Section – Application to amend your Retirement Account

### Personal details (please complete in BLOCK CAPITALS)

|             |                      |               |                      |
|-------------|----------------------|---------------|----------------------|
| Full name   | <input type="text"/> | NI Number     | <input type="text"/> |
| Phone/Email | <input type="text"/> | Date of Birth | <input type="text"/> |

Further information about the investment options available to you is set out in the Retirement Account Guide which can be found on the Scheme website ([www.lepensions.co.uk](http://www.lepensions.co.uk)).

### Your Investment Choices

Please tick one of the following and complete the details below:

- If you currently invest in the Lifestyle Strategy and wish to switch to Pick & Mix funds, please complete section A below. Please note that if you switch out of the Lifestyle Strategy then your existing Retirement Account funds will become Pick & Mix funds and remain in the fund currently invested (unless you choose to move your existing fund) and will not be switched in accordance with the Lifestyle Strategy as you approach retirement.
- If you currently invest in Pick & Mix funds and wish to change your future employer Retirement Account contributions or existing Pick & Mix options please complete section B overleaf.
- If you currently invest in Pick & Mix funds and wish to switch to the Lifestyle Strategy please complete section C overleaf. Please note that if you wish to switch to the Lifestyle Strategy, both your existing funds and your future employer Retirement Account contributions will be invested in accordance with the Lifestyle Strategy.

If you would like to check your current investment choices, please call XPS on 0117 440 2491 or log onto [www.MyPension.com/LEPS](http://www.MyPension.com/LEPS).

### Section A: Lifestyle Strategy member switching to Pick & Mix

Please specify below the % of your future employer Retirement Account contributions which you would like to invest in each fund. Please also specify the % of your existing Retirement Account which you wish to invest in each fund. If you wish to leave your existing Retirement Account invested in its current funds please tick here  and do not complete the last column of the table. If you elect to leave your existing Retirement Account invested in its current funds it will become a Pick & Mix fund selection and will not be switched in accordance with the Lifestyle Strategy.

| Fund Name                                | % of your future employer Retirement Account contributions | % of your existing Retirement Account |
|--|--|---------------------------------------|
| LEPS Long Term Growth Fund               |  |                                       |
| LEPS Stable Growth Fund                  |  |                                       |
| LEPS Cautious Growth Fund                |  |                                       |
| LEPS Global Equity Fund                  |  |                                       |
| LEPS ESG Global Equity Fund              |  |                                       |
| LEPS Islamic Global Equity Fund          |  |                                       |
| LEPS Corporate Bond Fund                 |  |                                       |
| LEPS Fixed Annuity Focus Fund            |  |                                       |
| LEPS Inflation-Linked Annuity Focus Fund |  |                                       |
| LEPS Cash Fund                           |  |                                       |
| <b>Total</b>                             | <b>100%</b>  | <b>100%</b>                           |

## Section B: Pick & Mix member wishing to switch Pick & Mix options

Please specify below the % of your future employer Retirement Account contributions which you would like to invest in each fund. Please also specify the % of your existing Retirement Account which you wish to invest in each fund. If you wish to leave your existing Retirement Account invested in its current funds please tick here  and do not complete the last column of the table.

| Fund Name                                | % of your future employer Retirement Account contributions | % of your existing Retirement Account |
|--|--|---------------------------------------|
| LEPS Long Term Growth Fund               |  |                                       |
| LEPS Stable Growth Fund                  |  |                                       |
| LEPS Cautious Growth Fund                |  |                                       |
| LEPS Global Equity Fund                  |  |                                       |
| LEPS ESG Global Equity Fund              |  |                                       |
| LEPS Islamic Global Equity Fund          |  |                                       |
| LEPS Corporate Bond Fund                 |  |                                       |
| LEPS Fixed Annuity Focus Fund            |  |                                       |
| LEPS Inflation-Linked Annuity Focus Fund |  |                                       |
| LEPS Cash Fund                           |  |                                       |
| <b>Total</b>                             | <b>100%</b>  | <b>100%</b>                           |

## Section C: Pick & Mix member wishing to switch to Lifestyle Strategy

Both your future employer Retirement Account contributions and existing Retirement Account will be invested in accordance with the Lifestyle Strategy. Please specify your Target Retirement Age, which can be any age from age 55. If you do not specify an age, we will automatically use age 65. Your Target Retirement Age can be changed at any time.

Target Retirement Age

### Declaration

I authorise the Trustee to invest the contributions in accordance with my investment instructions.

Signature

Date

Please return this form to:

Leonardo Electronics Pension Scheme, XPS Administration, Queen's Quay, 33-35 Queen Square, Bristol, BS1 4LU.

Alternatively email a scanned copy to [LEPS@xpsgroup.com](mailto:LEPS@xpsgroup.com)

Scheme hotline: 0117 440 2491

### Notes

**MyPension.com/LEPS** You can also make investment switches and change your Target Retirement Age by logging onto [www.MyPension.com/LEPS](http://www.MyPension.com/LEPS).

**Financial Advice** It is suggested that you may wish to consider taking independent financial advice prior to making a decision with regard to the investment of your Retirement Account.

**Implementation of change** The standard turnaround time for processing investment changes is 5 working days. Please note that the switch will be effective on the working day following the date the form is processed by XPS.

**Lifestyle Strategy - Target Retirement Age** The Lifestyle Strategy allows you to nominate a Target Retirement Age, which may be earlier than the Scheme's Normal Retirement Date. Choosing a Target Retirement Age lower than the Scheme's Normal Retirement Date does not give you a right to take your pension at this date. The terms relating to when you may take your pension are specified in the Scheme rules. Any information provided on this form in relation to Target Retirement Age will be treated with utmost confidentiality by the Trustee.

**Lifestyle Strategy – Retirement Focus fund** In the last three years before your Target Retirement Age your Retirement Account will move into the Retirement Focus fund. Within this fund there are four different options (see the Retirement Account Guide for details). If you would like to select an option within the Retirement Focus fund you can do this through [www.MyPension.com/LEPS](http://www.MyPension.com/LEPS). If you do not make a selection your Retirement Focus funds will be invested in the default option within Retirement Focus fund.