

Fund switch and redirection form

Important Information

You should complete this form if you wish to switch the fund(s) in which you are currently invested and/or redirect future regular monthly payments to your Plan.

Please complete all the appropriate sections in **BLACK** ink and **CAPITAL LETTERS**.

Important notes:

- Units will be sold at the first valuation point following receipt of your written instructions. The purchase of units will then take place at the next valuation point. This will normally be on the following working day. During this time, the value of your investment will not change with any general market movement.
- If you wish to switch your investment in the last five years leading up to your retirement and the Security Option applies to your Plan, the Security Option will automatically apply to any switches you make. Additional information is contained in the 'Terms and Conditions of the WS Stakeholder Pension Scheme' under section 8 of the Plan Conditions.
- Future contributions will normally be redirected from the next payment received following receipt of your written instructions.

We require the return of this form with your signature before we can process your switch request. Please complete and return to: Waystone Management (UK) Limited, PO Box 5246, Aspect House, 63 Spencer Road, Lancing, BN99 9GP

1. PERSONAL DETAILS

Plan number	<input type="text"/>
Mr/Mrs/Miss/Ms/Other	<input type="text"/>
Surname	<input type="text"/>
Forename(s)	<input type="text"/>
Address	<input type="text"/>
	<input type="text" value="Postcode"/>
Telephone number	<input type="text"/>
Email address	<input type="text"/>

2. FUND SWITCHING

You should complete this section if you wish to switch units in your existing fund(s) to one or more of our other funds.

From: Name of fund(s)	Units in fund to be switched (whole %)	To: Name of fund(s)	New allocation (whole %)
Example			
WS Cash Pension Fund	100%	<input checked="" type="checkbox"/> WS Global Multi Index Pension Fund <input checked="" type="checkbox"/> WS Sterling Corporate Bond Index Pension Fund	40% 60%
WS Global Multi Index Pension Fund	%	<input type="checkbox"/> WS Global Multi Index Pension Fund	%
WS Global Emerging Markets	%	<input type="checkbox"/> WS Global Emerging Markets	%
WS UK Gilt Index Pension Fund	%	<input type="checkbox"/> WS UK Gilt Index Pension Fund	%
WS Global Developed Index Pension Fund	%	<input type="checkbox"/> WS Global Developed Index Pension Fund	%
WS Cash Pension Fund	%	<input type="checkbox"/> WS Cash Pension Fund	%
WS Sterling Corporate Bond Index Pension Fund	%	<input type="checkbox"/> WS Sterling Corporate Bond Index Pension Fund	%

3. REDIRECTING FUTURE REGULAR CONTRIBUTIONS

You should complete this section to change the fund(s) in which future contributions are invested. Please complete the table below, using whole percentages, indicating how you would like future contributions to be invested.

	% Investment Split Regular Contributions
WS Global Multi Index Pension Fund	%
WS Global Emerging Markets	%
WS UK Gilt Index Pension Fund	%
WS Global Developed Index Pension Fund	%
WS Cash Pension Fund	%
WS Sterling Corporate Bond Index Pension Fund	%
Total	100%

Or

I wish future contributions to be invested in the following Lifestyle Profile

Profile 1 Profile 2 Profile 3

During the five years before your Selected Retirement Date, the pension fund will gradually be switched into the WS Cash Pension Fund. This is known as the Security Option. For more information, please see Section 8 of the Plan Conditions, which can be found in the [Key Features and Terms and Conditions](#) of the WS Stakeholder Pension Scheme.

If you would like to opt out of the Security Option, please tick here

4. AUTHORISATION

I hereby authorise WMUK to switch my existing fund holdings and/or redirect future regular contributions in accordance with this instruction. I understand that the switch is subject to the Plan's terms and conditions.

Print full name (in BLOCK CAPITALS)

Signature

Date

D	D	M	M	Y	Y	Y	Y
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Once completed the form should be returned to:

Waystone Management (UK) Limited
PO Box 5246,
Aspect House
63 Spencer Road
Lancing
BN99 9GP