



CHANGE OF INVESTMENT

Application form

This application form is for changing your investment choice.

It can be used with the following existing plans:

- Talisman Personal Pension Plans, Executive Pension Plans, Free Standing AVC Pension Plans and Buyout Bonds
 - Talisman Group Personal Pension Plans, Group Pension Plans and Continuation Pension Plans
 - Talisman Retirement Options Plans
 - Crest Growth Pension Plans
 - Crest Growth Individual Pension Policies.
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Important information

Please read before completing this application form.

- Please use BLOCK CAPITALS and black ink when completing this form.
- For details of all the investment choices please refer to our website at royallondon.com
- We recommend you take financial advice before changing your investment choice, as selecting unsuitable investments may significantly reduce the value of your pension savings.
- If you need any help completing this form you can contact us on 0345 60 50 050 (Mon – Fri 8am – 6pm)
- Your completed form should be sent to us at **Royal London, Royal London House, Alderley Road, Wilmslow, Cheshire, SK9 1PF**

1 Personal information

This section should be completed by all applicants.

Member/planholder's name	<input type="text"/>
Plan number	<input type="text"/>
Scheme number (if applicable)	<input type="text"/>
Member/planholder's contact telephone number	<input type="text"/>
Member/planholder's email address	<input type="text"/>

2 New investment choice continued

(ii) Future regular payments

If you are making future regular payments do you want your new fund selection as shown in Part A (i) Table 2 to apply to these payments as well? Yes No Not applicable

If 'No' please complete the table below to tell us what individual funds you would like your future regular payments to be invested in. The percentage split must add up to 100%.

Fund name	Percentage (%)	Fund name	Percentage (%)
Total	100%	Total	100%

Note: The redirection of future regular payments for Crest Growth Pension Plans will only take effect from the next renewal date.

Part B: Retirement Investment Strategy

Please select one of the following Retirement Investment Strategies:

- Balanced Retirement Investment Strategy
- Opportunity Retirement Investment Strategy
- Cautious Retirement Investment Strategy

You cannot invest the income drawdown part of your Talisman Retirement Options Plan in a Retirement Investment Strategy.

For Crest Growth Pension Plans and Crest Growth Individual Pension policies it is only possible to switch into a Retirement Investment Strategy on the plan/policy renewal date.

3 Declaration

The member/planholder, trustees or financial adviser should complete this section.

If the member/planholder and/or trustees are giving the authorisation for the change in the investment selection then only Part (i) below should be completed. If the financial adviser is changing the investments on behalf of the member/planholder then only Part (ii) below should be completed.

(i) Member/planholder and/or trustee authorisation

I apply to change the investment choice according to the instructions given in section 2.

I confirm that I have read the relevant factsheets for the investments I have chosen. I understand that additional fund management charges may apply to the investments I have selected.

Member/planholder's signature Date

Must be signed for all plan types except Talisman Executive Pension Plans and Crest Growth Pension Plans.

and/or

Trustee's signature Date
Official position

Must be signed for Talisman Executive Pension Plans and Crest Growth Pension Plans only.

(ii) Financial adviser authorisation

Financial adviser's signature Date
FCA reference number
Royal London agency number
Contact telephone number

Note: If signed by a financial adviser on behalf of the member/planholder and/or trustees, Royal London reserves the right to request a letter of instruction signed by the member/planholder and/or trustees giving details of the investments to be made. Alternatively, written authority to act upon the financial adviser's instructions can be provided by the member/planholder and/or trustees. Royal London reserves the right not to accept instructions without this authority. **Please note it is the financial adviser's responsibility to ensure that instructions sent to Royal London correctly reflect the member/planholder's and/or trustee's wishes.**



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