**Staffordshire Pension Fund Logo**

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| **STANDARD LIFE: ADDITIONAL VOLUNTARY CONTRIBUTIONS (AVC)**  **Request to amend investment arrangements** |

*If you are paying additional voluntary contributions to Standard Life through an arrangement with the Staffordshire Pension Fund and you would like to amend the amount that you are paying and/or the investment allocation, complete the relevant parts of this Form to indicate your wishes.*

*Then sign the Form and return to:*

**Pension Services, Staffordshire County Council,**

**2 Staffordshire Place, Tipping Street, Stafford ST16 2DH**

**Email:** [**pensions.enquiries@staffordshire.gov.uk**](mailto:pensions.enquiries@staffordshire.gov.uk)

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| **PERSONAL DETAILS**  (To be completed in all cases) | | | |
| **Surname:** |  | **Title:** |  |
| **Forename(s):** |  | | |
| **Employer:** |  | | |
| **Date of Birth:** |  | **National Insurance**  **Number:** |  |
| **Home Address:** |  | | |
|  | | **Post Code:** |  |
| **Email Address:** |  | | |

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| **AMENDMENT TO AMOUNT OF CONTRIBUTIONS PAYABLE** |
| *If you wish to increase or reduce the amount of contributions deducted from your pay, complete this part of the Form.* ***Leave blank if you do not wish to change your contributions.***  **I would like to amend the amount of Additional Voluntary Contributions which are deducted from my pay and paid over to Standard Life.**  **With effect from** *(give date)* *………………………….* **I request that the amount of** **contributions deducted from my pay should be** *(tick and complete one of the following):*  …………….. **% of pay**  £…………….. **gross pay each month/week** |

**INVESTMENT ALLOCATION**

*If you would like to change the way in which your contributions are invested, indicate your preference by ticking Box* ***A*** *or* ***B*** *below, and then by ticking the box relevant to your preferred profile (in the case of Box A) or preferred fund (in the case of Box B).* ***Leave blank if you do not wish to change your investment allocation.***

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|  | **A. Lifestyle Profile** | |
|  | | |
|  |  | **1. Sustainable Multi Asset Lump Sum (10 Year) SLP (C3AP)** |
|  | | or |
|  |  | **2. Sustainable Multi Asset Lump Sum (10 Year strategic profile) SLP (6ESG)** |
| Lifestyle profiles are investment options that are specifically designed to make it easy for you to save for retirement. Once you’re in a lifestyle profile you don’t need to do anything, although it is recommended that you regularly review your investments to make sure they’re on track to meet your goals. **If you choose one of these options you must invest 100% in it.**  The lifestyle profile targets encashment rather than an annuity purchase, for members who prefer to take their AVC as a lump sum at retirement. | | |
| I plan to retire at *(tick as appropriate)*:  age 60  age 61  age 62  age 63  age 64  age 65  age 66  age 67  age 68  age 69  age 70 | | |
| **From** **……………***(date)* **I wish my Additional Voluntary Contributions to be invested as shown above. I request that all contributions paid to Standard Life before that date**  **should  should not**  **be transferred to the new arrangement.** | | |

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|  | **B. Personal Investment Choice** | | |
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| This gives you the opportunity to choose your investment route. You can either put 100% of your investment in a single fund or allocate it, according to personal choice, between any of them: | | | |
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| *Standard Life Managed Pension Fund (FA)* | | **........%** | A managed fund of which a substantial part is normally invested in UK equities with the remainder held in overseas equities, fixed interest stocks and property. Objective is to maximise returns in a risk-controlled environment. |
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| *Standard Life Money Market Pension Fund (GS)* | | **........%** | Invests in a range of money market instruments – including bank and building society deposits, certificates of deposit, floating rate notes, short-dated government bonds, and asset backed securities. Contains a proportion of longer-term and potentially more volatile investments. |
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| *Standard Life Ethical Pension Fund (G7)* | | **........%** | Invests in UK equities and corporate bonds but not with companies which, for example, damage the environment or test cosmetics on animals. Companies making positive contributions to society with environmental initiatives are favoured. |
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| *Standard Life Deposit and Treasury Pension Fund (G4)* | | **........%** | Invests only in short term market instruments (no asset backed securities), e.g. in overnight deposits, fixed interest deposits and certificates of deposit with a maximum maturity of 3 months. Treasury bills (max 90 days) and gilts with a maturity of less than 90 days may be held if it is not possible to place deposits with a sufficiently diversified range of banks. |
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|  | | **100 %** | The above must total 100% |
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| **From ……………***(date)* **I wish my Additional Voluntary Contributions to be invested as shown above. I request that all contributions paid to Standard Life before that date**  **should  should not**  **be transferred to the new arrangement.** | | | |

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| **PART C – CERTIFICATION**  (To be completed in all cases) | | | |
| **I request and authorise my employer, and Staffordshire County Council as Pension Fund administering authority, to change my previous instructions regarding the deduction of Additional Voluntary Contributions to those I give above.** | | | |
| **Your Signature:** |  | **Date:** |  |