

# O2 Pension Plan

## Change of investment form

As a Member of the O2 Pension Plan ('the Plan') with a retirement account you have the option of choosing where your contributions are invested.

You should complete this form if you would like to switch the investment of your entire retirement account. Any changes you make will move where the entire fund you have built up to date is invested.

### Your details

Full Name: \_\_\_\_\_

EIN (if known): \_\_\_\_\_

National Insurance number: \_\_\_\_\_

Date of Birth: \_\_\_\_\_

Section of the Plan: \_\_\_\_\_

### Your investments

After reading the investment information on [www.o2pensions.co.uk](http://www.o2pensions.co.uk), I would like to move where my retirement account is invested as follows:

#### 1. In the Selfstyle option with my funds invested as indicated below:

Funds	% Allocation
UK Equity Fund – Legal & General	
Global Equity (50:50) Fund – Legal & General	
Index-linked Gilt Fund – Legal & General	
Pre-Retirement Fund – Legal & General	
Cash Fund – Legal & General	
Sharia compliant - HSBC Amanah Fund	
Global Focus Fund – Gartmore	
Target Return Fund – BlackRock	
UK Focus Fund – BlackRock	
<b>TOTAL</b>	<b>100%</b>
<b>NB. The distribution of your investments should total 100%.</b>	

#### 2. Or, in the Default Lifestyle option. Please circle this option to select.

If you choose this option, please indicate at what age you would prefer to retire: \_\_\_\_\_

#### 3. Or, in one of the alternative Lifestyle options. Please circle your option below:

Higher Risk/Return

Lower Risk/Return

If you choose one of these options, please indicate at what age you would prefer to retire: \_\_\_\_\_

### Declaration

I acknowledge that the Plan administrators will act on my instructions immediately upon receipt of this form, although changes may not actually be implemented until the following month. Please accept this form as authority to issue the Plan administrators and/or the Plan Trustee with any information they may require.

Signed: ..... Dated: .....

Please return this form to the administrators at:  
O2 Admin Team, Accenture HR Services, Venture House, Venture Way, Chesterfield, S41 8NR