

Changing your investments form

Please use this form to tell us how you would like to change your pension investments.

Important Notes:

You can register for our online service, Manage Your Account at legalandgeneral.com/workplacepensions If you have already registered with us, you can also change where your savings are invested online.

If your email address has previously been verified and held on record, you can email your instruction to us at switch.referrals@landg.com. Alternatively you can post the completed form to the address shown on the last page in section 6.

1. You can find full details of the investment choices that are available to you, by logging in to or registering for Manage Your Account at legalandgeneral.com/manageyouraccount
2. You may invest in up to 50 different funds for your plan. There is no charge for changing how you invest your money, but we will write to you if this changes in the future. There may be a cost for buying or selling units in a fund, or switching units between funds. These costs are known as transaction costs. For more information on transactions costs, please visit [Your guide to how your funds are managed](#)
3. To find out what terms and conditions apply when you change your investments, please see your Policy Booklet.
4. If you choose to invest in a fund that invests in property, we might have to delay encashing the units during periods when property can't easily be sold or valued.

We will use the working day this form is received as the instruction date, provided this is before 4pm. If we receive your instruction either after 4pm, over a weekend, on a bank holiday, or on another non-dealing day, the instruction date will be the next working day. The switch will complete two working days after the instruction date.

Part 1 – About you

Mr/Mrs/Miss/Ms/other	<input type="text"/>
Surname	<input type="text"/>
First names	<input type="text"/>
Home telephone number	<input type="text"/>
Mobile	<input type="text"/>
Email address	<input type="text"/>
Account number	<input type="text"/>
Name of your employer	<input type="text"/>
National Insurance number	<input type="text"/>
Date of birth	<input type="text"/>

Part 2 – What investment changes do you want to make?

Tick ONE box only

Select individual investment fund(s) (**complete sections 3 and 5**)Select a lifestyle profile (**complete sections 4 and 5**)

Part 3 – Select individual investment fund(s)

The instructions you give us below will be applied to all monies held in your pension pot.

From Name of fund(s)	Fund code	Percentage of pension pot to be moved (%)	To Name of fund(s)	Fund code	New allocation (%)
Please ensure that the percentages above add up to 100%					

Part 4 – Do you want to invest in a lifestyle profile?

Instead of investing individual funds, you can invest in one of our lifestyle profiles. Please log in to Manage Your Account to see which lifestyle profiles are available to you.

You can be invested in individual funds or a lifestyle profile, but you can't be in a combination of both. So if your money is currently invested in a lifestyle profile and you make investment changes, the money you've already paid in will be moved out of your existing lifestyle profile.

It's also not possible to choose a lifestyle profile if you're taking income drawdown.

Name of lifestyle profile	Fund Code	Percentage of your money invested
		100%

Part 5 – Your authorisation

I hereby authorise Legal & General to move my existing money in accordance with my instructions on this form. I understand that any changes I make to my investments are subject to the conditions shown on page 1.

Policyholder Signature	<input type="text"/>	Date of signature (dd/mm/yyyy)
		<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>

If your email address has previously been verified and held on record you can email your investment instructions to us at **switch.referrals@landg.com**

Or you can post your completed form to the following address:

Workplace Pensions
Legal & General
10 Fitzalan Place
Cardiff
CF24 0TL

If you have any questions about completing this form, please give us a call on 0345 070 8686. Lines are open between the hours of 8.30am and 7pm Monday to Friday. Call charges will vary. We may record and monitor calls.

Legal & General Assurance Society Limited

Registered in England and Wales No. 00166055 Registered office:
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We are authorised by the Prudential Regulation Authority and regulated by the
Financial Conduct Authority and the Prudential Regulation Authority.