

## AVC Investment Switch Form

### Personal details (please complete in BLOCK CAPITALS)

Full name	<input type="text"/>	NI Number	<input type="text"/>
Phone/Email	<input type="text"/>	Date of Birth	<input type="text"/>

Further information about the investment options available to you is set out in the AVC Guide which can be found on the Scheme website ([www.lhpensions.co.uk](http://www.lhpensions.co.uk)).

### Your Investment Choices

Please tick one of the following and complete the details below:

- If you currently invest in the Lifestyle Strategy and wish to switch to Pick & Mix funds, please complete section A below. Please note that if you switch out of the Lifestyle Strategy then your existing funds will become Pick & Mix funds and remain in the fund currently invested (unless you choose to move your existing fund) and will not be switched in accordance with the Lifestyle Strategy as you approach retirement.
- If you currently invest in Pick & Mix funds and wish to change your future or existing Pick & Mix options please complete section B overleaf.
- If you currently invest in Pick & Mix funds and wish to switch to the Lifestyle Strategy please complete section C overleaf. Please note that if you wish to switch to the Lifestyle Strategy, both your existing funds and your future contributions will be invested in accordance with the Lifestyle Strategy.

If you would like to check your current investment choices, please call XPS on 0117 440 2493 or log onto [www.MyPension.com/LHPS](http://www.MyPension.com/LHPS).

### Section A: Lifestyle Strategy member switching to Pick & Mix

Please specify below the % of your future contributions which you would like to invest in each fund. Please also specify the % of your existing AVC Fund which you wish to invest in each fund. If you wish to leave your existing AVC Fund invested in its current funds please tick here  and do not complete the last column of the table. If you elect to leave your existing AVC Fund invested in its current funds it will become a Pick & Mix fund selection and will not be switched in accordance with the Lifestyle Strategy.

Fund Name	% of your future contributions	% of your existing funds
LHPS Long Term Growth Fund		
LHPS Stable Growth Fund		
LHPS Cautious Growth Fund		
LHPS Global Equity Fund		
LHPS ESG Global Equity Fund		
LHPS Islamic Global Equity Fund		
LHPS Corporate Bond Fund		
LHPS Fixed Annuity Focus Fund		
LHPS Inflation-Linked Annuity Focus Fund		
LHPS Cash Fund		
<b>Total</b>	<b>100%</b>	<b>100%</b>

## Section B: Pick & Mix member wishing to switch Pick & Mix options

Please specify below the % of your future contributions which you would like to invest in each fund. Please also specify the % of your existing AVC Fund which you wish to invest in each fund. If you wish to leave your existing AVC Fund invested in its current funds please tick here  and do not complete the last column of the table.

Fund Name	% of your future contributions	% of your existing funds
LHPS Long Term Growth Fund		
LHPS Stable Growth Fund		
LHPS Cautious Growth Fund		
LHPS Global Equity Fund		
LHPS ESG Global Equity Fund		
LHPS Islamic Global Equity Fund		
LHPS Corporate Bond Fund		
LHPS Fixed Annuity Focus Fund		
LHPS Inflation-Linked Annuity Focus Fund		
LHPS Cash Fund		
<b>Total</b>	<b>100%</b>	<b>100%</b>

## Section C: Pick & Mix member wishing to switch to Lifestyle Strategy

Both your future contributions and existing AVC Fund will be invested in accordance with the Lifestyle Strategy. Please specify your Target Retirement Age, which can be any age from age 55. If you do not specify an age, we will automatically use age 65. Your Target Retirement Age can be changed at any time.

Target Retirement Age

### Declaration

I authorise the Trustee to invest the contributions in accordance with my investment instructions.

Signature

Date

Please return this form to:  
Leonardo Helicopters Pension Scheme, XPS Administration, PO Box 562, Middlesbrough, TS1 9JA.

Scheme hotline: 0117 440 2493  
Email: LHPS@XPSgroup.com

### Notes

**MyPension.com/LHPS** You can also make investment switches by logging onto [www.MyPension.com/LHPS](http://www.MyPension.com/LHPS).

**Financial Advice** You should consider taking independent financial advice before making AVCs.

**Historic AVCs** Please note that this form only relates to your AVCs with Mobius Life. If you wish to transfer any funds held with Prudential please contact XPS.

**Implementation of change** The standard turnaround time for processing investment changes is 5 working days. Please note that the switch will be effective on the working day following the date the form is processed by XPS.

**Lifestyle Strategy - Target Retirement Age** The Lifestyle Strategy allows you to nominate a Target Retirement Age, which may be earlier than the Scheme's Normal Retirement Date. Choosing a Target Retirement Age lower than the Scheme's Normal Retirement Date does not give you a right to take your pension at this date. The terms relating to when you may take your pension are specified in the Scheme rules.

**Lifestyle Strategy – Retirement Focus fund** In the last five years before your Target Retirement Age your funds will move into the Retirement Focus fund. Within this fund there are three different options (see the AVC Guide for details). If you would like to select an option within the Retirement Focus fund you can do this through [www.MyPension.com/LHPS](http://www.MyPension.com/LHPS). If you do not make a selection your Retirement Focus funds will be invested in the default option within Retirement Focus fund.