

BOOST^{PRU}



AVC FACILITY
AMENDMENT FORM

ABOUT THIS AMENDMENT FORM

THIS FORM IS FOR EXISTING MEMBERS WHO WANT TO AMEND THEIR AVCs, THE WAY IN WHICH THEY ARE INVESTED, AND/OR MAKE LUMP SUM PAYMENTS.

The different parts of this form cover:

1. Your personal details
2. Your employment details
3. Contributions
4. Investment Instructions
5. Important notice
6. Declaration

Please complete the form carefully and fully, otherwise delays in processing may occur. Should an error be made in completing this form, it must be clearly crossed through and the correction signed by yourself. Under no circumstances should correction fluid be used. Please print in CAPITALS.

Name of Scheme

Scheme Reference Number (Prudential use only)

PART 1 PERSONAL DETAILS

National Insurance Number

Surname

Forename(s)

Title Mr Mrs Miss Other

Date of Birth

Sex M F

PART 2 EMPLOYMENT DETAILS

Employer name

Employer address

Postcode

Current annual salary £

Position

PART 3 CONTRIBUTIONS

I wish to amend my AVCs as follows:

Existing regular contributions % of salary per month

New contribution level % of salary per month

With effect from

* Please note that the contribution you have specified is gross of income tax and is the full amount which will be credited to your Prudential AVC fund.

In addition, or instead, you may wish to make a lump sum payment. Please state:

Amount £

Are your additional contributions to be invested in the same funds and in the same proportions as your existing contributions Yes No

If **NO**, please complete part 4.

You can pay up to a maximum of 20% of your salary in any one Scheme year (1 April - 31 March) as AVCs.

Please note that all payments will be made by deductions from salary.

PART 4 INVESTMENT INSTRUCTIONS

Please complete this section if you would like to change your existing investments instructions or to direct contributions to different funds. Details of the funds can be found in your members brochure.

SECTION A INVESTMENT ALLOCATION OF FUTURE CONTRIBUTION

Please indicate below the funds and percentages to which future contributions are to be invested.

Investment Fund	Regular Payments	Lump Sum Payments
With-Profits Fund	<input type="text"/> %	£ <input type="text"/>
Unit-Linked Funds please specify name of fund		
<input type="text"/>	<input type="text"/> %	£ <input type="text"/>
<input type="text"/>	<input type="text"/> %	£ <input type="text"/>
<input type="text"/>	<input type="text"/> %	£ <input type="text"/>
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<input type="text"/>	<input type="text"/> %	£ <input type="text"/>
<input type="text"/>	<input type="text"/> %	£ <input type="text"/>
Deposit Fund	<input type="text"/> %	£ <input type="text"/>
Total	<input type="text"/> 100%	£ <input type="text"/>

If you require further boxes, please continue on a separate sheet of paper and enclose with the form.

Please ensure that the proportions you have indicated add up to 100%. If this section is not completed, your contributions will be invested as directed in your initial application form.

OR

Lifestyle Option

Please note that if you choose to invest in the Lifestyle Option, you cannot invest your contributions into any other funds. Please tick the appropriate profile:

Profile 10

If you require any further information about this option please refer to your Members Brochure.

SECTION B SWITCH OF EXISTING INVESTMENT

Please confirm below the percentages of the existing investment to be switched, the fund(s) to which the investment is now to be applied and the proportion to be applied to these funds. Please see the example below for guidance.

Example: A customer wants to transfer 50% of the money they have invested in the With-Profits Fund to the Cash Fund and the UK Equity Fund. They would like 25% of the switched funds to be invested in the Cash Fund and the remainder in the UK Equity Fund.

Investment Fund	% of existing investment to be switched	Fund(s) into which the investment is now to be applied	% of amount being switched to be applied to each new fund indicated
With-Profits Fund	50%	Cash Fund	25%
		UK Equity Fund	75%
			100%

Investment Fund	% of existing investment to be switched	Fund(s) into which the investment is now to be applied	% of amount being switched to be applied to each new fund indicated
	%		
			100%
	%		
			100%

If you require further boxes, please continue on a separate sheet of paper and enclose with the form.

Notes

1. If the percentage of the investment to be applied to the new fund(s) is not stated, the amount available for the investment will be split equally between the funds selected.
2. Switches will be applied with effect from the first working day following receipt by the Prudential Group AVC Department in Reading.
3. Full details of switch terms and available funds are contained in the Funds Leaflet.
4. A switch from the With-Profits Fund, may be subject to a Market Value Reduction.

PART 5 IMPORTANT NOTICE

You should understand and accept that:

- a) your employer does not accept responsibility for the accuracy of any statements or representations made in Prudential's literature;
- b) because individual circumstances vary, you should consider carefully whether contributing to this AVC facility is in your best interests;
- c) because the facility is a way of investing money in order to provide pension benefits, those benefits will depend on the contributions paid, the performance of the investments and on interest rates at retirement; and therefore there is no guarantee that any particular level of benefit will be available at retirement.

PART 6 DECLARATION

I authorise the deductions from my earnings of any revised level of Additional Voluntary Contributions (AVCs) specified above.

I request Prudential to action the instruction(s) given in part 4 (if completed) and I understand that these instructions can be accepted only subject to the Scheme Rules and in particular:

- i) Amounts which may be paid to an AVC fund, switched from or into a fund or remain in a fund are subject to a minimum amount.
- ii) A switch may be subject to an administration charge.

I declare that the total of my contributions does not exceed the limits described in part 3.

DATA PROTECTION:

Prudential and its other group companies*, and the Trustees or Managers of the Scheme will use the details and personal information you have given on this form (together with any other information about you) for administration, servicing, risk assessment, fraud prevention and regulatory purposes. We may also need to disclose your information to our other service providers (including the Trustees' or Managers' advisors) for these purposes and to pass it to the sponsoring employer or HM Revenue & Customs.

Please note that you have a right to apply for a copy of your personal information (for which a fee may be charged) and to have any inaccuracies corrected.

I consent to information about me being used as described above.

Signature

Date

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*The list of Prudential companies varies from time to time. The following companies are included within the Prudential group. This list is not exhaustive. Prudential Assurance Company Limited, Prudential Pensions Limited, Prudential Group Pensions Limited, M&G Investment Management Limited, Prudential Banking plc, M&G Limited, Scottish Amicable plc, Egg plc.

The terms and conditions relating to this contract, together with a copy of your completed application form, are available upon request.

MEMBER ACTION

Once completed please send to your Employer for processing.

EMPLOYER ACTION

Once processed for payroll deduction please send this form to the ITB Pension Funds, 23 King Street, Watford WD18 0BJ.



www.pru.co.uk

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