

BASF UK Group Pension Scheme - BPP & Group Sections

Investment Instruction Form

(new members)

Your details (Please complete in CAPITAL LETTERS)

Title:	Forename:
Surname(s):	Date of birth:
National Insurance no:	Employer:
Mobile telephone number:	Date Joining the Scheme (mm/yy):
Address:	Email address:
	BASF site (if applicable)

Investment instruction

You should choose **one** of the two investment paths available, LifePlan or FreePlan, by completing either the LifePlan or FreePlan section below and sign overleaf:

LifePlan

1 I want to invest my contributions in **LifePlan**
Please tick **one** of the Growth Fund options:

Adventurous Fund
 Moderate Fund
 Cautious Fund

2 Please tick **one** of the retirement benefit goals to target:

Guaranteed income (annuity)
 Flexible income (flexi-access drawdown)
 Cash lump sum

3 I want a Target Pension Date of:

 (Insert date between age 55 – 75)

OR

FreePlan

1 I want to invest my contributions in **FreePlan** as shown below.
Please insert a percentage next to your chosen funds (minimum 10%).

Fund	%
Adventurous Fund	_____
Moderate Fund	_____
Cautious Fund	_____
Ethical Fund	_____
Islamic Fund	_____
Pre-Retirement Annuity Fund	_____
Sterling Liquidity Fund	_____
Total	100%

Note: if you choose to invest in LifePlan, elsewhere you will see it labelled according to the Growth Fund and target benefit goal you have chosen. For example, if you chose the Adventurous Fund and a Flexible Income, this is the “Adventurous Flexible income LifePlan”.

Important notes

- The investments you have chosen will apply to all contributions to your DC Account.
- If you don't choose how to invest your DC Account, your DC Account will automatically be invested in the default, the Moderate Flexible Income LifePlan with a target pension date of age 65.
- If you later wish to change your investment choices, you can do so at any time, free of charge by logging onto the Pension Portal at <https://www.buckhrsolutions.co.uk/basf> once you've received your New Starter Pack from the Scheme Administrator, around a month after you have joined the Scheme.
- If you do not complete this form correctly, your contributions may not be invested in line with your wishes. You should check your investments on the Pension Portal (see above point).
- Detailed information about the investment options is available in the Investment Guide (Jan 2016) and in fund factsheets, available at <http://ukpensions.basf.co.uk>. We recommend you read these documents before completing and submitting this form.

Signed

Date

Once you have completed this form, please email it with the email subject line as 'New Member Investment Instruction Form' to:

basf@buck.com

Alternatively, once you've signed the form you can post it to:

BASF
BUCK (Bristol)
PO Box 319
Mitcheldean
GL14 9BF

You should also keep a copy for your records.

Using the information you provide on this form



Providing your mobile phone number and email address is optional. If you do choose to provide these details, they will be held by the BASF Group, the Trustee and their advisers and only used to provide you with information relating to the BASF UK Group Pension Scheme. Your details will not be passed to any third parties to be used for any other purpose. If, at any time, you wish to stop being sent BASF UK Group Pension Scheme updates via your mobile phone or email, you can request to opt out and we will remove these details from our system. Any information you provide will be held and processed in accordance with the General Data Protection Act Regulation. For further information about how the Trustee will process and use your personal information, please see our Privacy Notice, which can be found at, <http://ukpensions.basf.co.uk>.