

## BASF UK Group Pension Scheme - Group & BPP DC Sections ("the Scheme")

# Investment Instruction for commencement of AVCs

### Your details

Please complete in BLOCK CAPITALS

Title (Dr/Mr/Mrs/Miss/Ms):	Forename(s):
Surname:	National Insurance No:
Date of birth:	Employee No:
Site Location:	Email address:

You should complete this form if you are about to pay AVCs for the first time and want to invest them differently to your regular contributions. If you have previously paid AVCs see 'Important notes' overleaf (you should not use this form).

I wish to pay AVCs as indicated on Ingenuity on the Web at the annual renewal date (31 March) and this being the first time I have paid AVCs, wish the money to be invested as follows:

### Investment instruction

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

#### LifePlan

**1**  I want to invest my AVCs 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)  
Please note your chosen Target Pension Date will apply to **all of your LifePlan investments in your DC Account**, not just your AVCs/Bonus.

OR

#### FreePlan

**1**  I want to invest my AVCs 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	_____
<b>Total</b>	<b>100%</b>

**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

- Please see the Investment Guide (January 2016) for the details of the investment options available in the Scheme.
- The investments you have chosen will apply to all AVCs paid to your DC Account.
- If you have previously paid AVCs and wish to change your investment choices, you can do so by logging onto ePA at <https://epa.towerswatson.com/accounts/basf>. If you need help logging on, contact Willis Towers Watson on 0113 390 7119.
- If you are in any doubt about paying AVCs you are recommended to seek independent financial advice.

**Signature:**

**Date:**

**Please return your completed form to the Scheme Administrator, Willis Towers Watson at:**

**email:** [basf@willistowerswatson.com](mailto:basf@willistowerswatson.com)

**post:** Willis Towers Watson, PO Box 545, Redhill RH1 1YX

**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>.

