

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

# Scheme Pays election form

### You should complete this form if:

1. Your pension savings in the Scheme over a tax year have exceeded the Annual Allowance.
2. Your respective Annual Allowance charge is more than £2,000; and
3. You want the Scheme to deduct the Annual Allowance charge from your Scheme benefits (from your DC Account) and pay it directly to HMRC.

Further information on pensions savings and the Annual Allowance can be found on the Government's website at <http://www.gov.uk/tax-on-your-private-pension/annual-allowance>

### Your details (Please complete in BLOCK CAPITALS)

Title	Forename
Surname(s)	Date of birth
National Insurance no.	Employee no.
Mobile telephone number	Email address
Address	BASF site

### Annual Allowance election

Tax year end to which the Annual Allowance charge relates:	05/04/20 _____ (insert year)	
Amount of Annual Allowance charge to be paid from the Scheme:*	£	
I confirm that the amount of the Annual Allowance charge above has been calculated at the correct rate(s):	<input type="checkbox"/> Yes	<input type="checkbox"/> No

Where the amount of the Annual Allowance charge to be paid from the Scheme is less than £2,000, please complete the declaration below:

I confirm that my total Annual Allowance charge liability for the tax year above exceeds £2,000:	<input type="checkbox"/> Yes	<input type="checkbox"/> No
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If you intend to take your benefits from the Scheme in the next 12 months, please complete the following declaration:

I intend to take all my benefits from the Scheme in the next 12 months:	<input type="checkbox"/> Yes	<input type="checkbox"/> No
If yes, please advise the date from which you expect to take your benefits:		

Will you reach the age of 75 in the tax year to which this election relates? If yes, a further declaration will be sent to you.	<input type="checkbox"/> Yes	<input type="checkbox"/> No
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\* Where final information is not yet available to calculate the charge, an estimated amount can be provided based on the latest available information.

As you have Defined Contribution holdings within the Scheme, please confirm from which funds you would like your specified charge deducting by completing your chosen option below:

**Option 1: In line with my existing investment choices, including LifePlan\***  
Please tick here if you would like the charge deducted in line with your existing investment choices for your regular monthly contributions. If you are invested in one of the LifePlan investment options and your account is in the switching period, by choosing this option, the charge will be deducted proportionately across your investment fund holdings in line with the switching process.

**Option 2: In line with the instruction in the table below:**

Fund	Percentage of Annual Allowance charge to be deducted from each fund (%)
Adventurous Fund	
Moderate Fund	
Cautious Fund	
Ethical Fund	
Islamic Fund	
Pre-retirement Annuity Fund	
Sterling Liquidity Fund	
<b>Total</b>	<b>100%</b>

\* In the absence of any instruction, this will be the default option for deducting the charge.

**I understand that I cannot withdraw this notice, and my benefit rights in the Scheme will have to be adjusted to take account of the tax that will be paid on my behalf by the Scheme.**

<b>Signed</b>	<b>Date</b>
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**Once you have completed this form, please return it to:**  
Willis Towers Watson Ltd, PO Box 545, Redhill, RH1 1YX

**Alternatively, once you have signed the form, you can scan it and email it to:**  
basf@willistowerswatson.com

**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>.

