

Investor Plan

Investment choice

For members who wish to make changes to their investment choice outside of the Investor Plan website

Please use **BLOCK CAPITALS**

Surname	<input type="text"/>
Forename(s) in full	<input type="text"/>
National Insurance number	<input type="text"/>
Date of birth	<input type="text"/> <input type="text"/> / <input type="text"/> <input type="text"/> / <input type="text"/> <input type="text"/>
Email address	<input type="text"/>
Telephone number	<input type="text"/>

Please tick the sections of the form completed

- Investment Choice
(Pages 2-3)
- Target Retirement Age
(Page 4)

Please sign and date below to confirm your instructions

Signature	<input type="text"/>
Date	<input type="text"/> <input type="text"/> / <input type="text"/> <input type="text"/> / <input type="text"/> <input type="text"/>

Please return your completed form to **HR Direct (Pensions - Investor Plan)**

Visit https://hrs.siemens.com/os/portal/hr_uk/uk/welcome

Don't forget, you can view your pension account online

To activate your online pension account you can either:
Go to www.siemens.co.uk/mypension and use your PKI access to log on.

Or, if you would prefer to access your pension account outside of the Siemens network call the Orbit Helpline on **0207 204 1212** or email info@orbitbenefits.com to set up your online pension account. They will also be able to assist you if experience any problems accessing your pension account.

Office use only – HR departments

Employee number/SAP ID number

Payroll number

Please ensure that the member's details and decisions have been updated to SAP as soon as possible and then forward this form to the Siemens Investor Plan team by the 15th of the month in which the employee joined the Company/Scheme. If this is not actioned in time, the 'new entrant' letter sent to members will not reflect the member's wishes.

Investment Choice



There is detailed information about your investment choices at www.siemens.co.uk/mypension; you may find it useful to refer to when completing this form.

Costs

Each investment option has an annual management charge; you can find out more on the **MyPension** website.

Also, when you move investments from one strategy or option to another you may, in effect, incur costs. This is because investment managers can reflect in the unit price the costs of buying additional assets or the costs of selling assets, depending on the total cash flow in or out of the investment option each day.

The Company currently meets all administration charges. However the Trustees reserve the right to introduce charges for members who make frequent changes.

Investment Choice

Using the table below, please confirm the percentage of your current fund(s) to be directed into the new funds available. Less than 100% may be selected, however, any remaining investments not directed by this form will follow the default position as detailed in the table below.

IMPORTANT NOTE: If this form is used to re-direct any investments currently in a Lifestyle profile, no further switches will be made on that profile. Any future contributions made will be invested in the Lifestyle allocation effective at the date of the contribution.

	New Fund													If your total does not equal 100% your remaining fund will be directed to:	
	Opportunity	Balanced	Consolidation	Annuity Target	Cash	Global Equity - Active	Global Equity - Passive	UK Equity - Active	UK Equity - Passive	Property & Infrastructure	Inflation-Linked Annuity Target	Ethical	Shariah		
Balanced fund															Balanced fund
Annuity Target															Annuity Target
Cash															Cash
Global Equity - Active															Global Equity - Active
Global Equity - Passive															Global Equity - Passive
UK Equity - Active															UK Equity - Active
UK Equity - Passive															UK Equity - Passive
Property & Infrastructure															Property & Infrastructure
Inflation-Linked Annuity Target															Inflation-Linked Annuity Target
Ethical															Ethical
Shariah															Shariah

The Trustees and the Company cannot be held liable for the adverse impact of market movements that take place before changes take effect.

Your target retirement age

For members investing in Lifestyle strategies

The Investor Plan's normal retirement date is the end of the month in which you reach age 65. If you want to retire at any age other than age 65, and are investing in a Lifestyle strategy, you must choose a target retirement age to let the Trustees know when to switch your account from higher-risk to lower-risk investment options.

The age will not be disclosed to the Company.

Your target retirement age

I would like my target retirement age to be:

You can choose any age from 55.

How your target retirement age affects your pension account

The Traditional Annuity Lifestyle, Flexible Access Lifestyle and Cash Out Lifestyle strategies start switching your account from growth options into protection options over a different length of time, depending on how far you are from retirement. This means if you don't choose a target retirement age, your account may be left in higher-risk options at a time when you may want to be looking to protect your savings.

For example, if you're in Flexible Access Lifestyle and your target retirement age is 65, but you actually retire at 60, your account will still be invested in higher-risk options when you retire, not having had the time to switch to more balanced options. Investing in higher-risk options close to retirement puts your pension savings at risk of falling in value.

For more information on investing in Lifestyle strategies, please refer to the Investor Plan guide, which you can download from the Investor Plan website at www.siemens.co.uk/mypension