

BAXI GROUP PENSION SCHEME APPLICATION FORM

You have been offered membership of the Baxi Group Pension Scheme. Before completing this form, it is important that you have read the Investment Guide, the Scheme booklet as well as referred to Baxi website (<http://www.baxipensions.co.uk>). To join the Scheme, simply complete this application form and return it to the person responsible for HR at your site, to arrive no later than 3 months after your eligible employment started.

Please use **CAPITALS** when filling in your details.

1. PERSONAL DETAILS

Surname	Title	Forenames
Date of birth (dd/mm/yy)		NI Number
Date started employment		Date contributions to start (dd/mm/yy)

2. ADDRESS DETAILS

Address	
	Postcode

3. HOW MUCH DO YOU WANT TO PAY?

Please authorise the monthly deduction from your pay by ticking the level of contribution you wish to pay. The level of associated company contributions is set out in the booklet.

3%	<input type="checkbox"/>	4%	<input type="checkbox"/>	You must contribute a minimum of 3% of your pay
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You may also pay Additional Voluntary Contributions (AVCs), however these contributions do not attract company contributions. If you would like to pay AVCs please complete an AVC application form.

4. HOW WOULD YOU LIKE YOUR CONTRIBUTIONS TO BE INVESTED?

EITHER

Select your own individual investment fund/s from the range listed below. The minimum amount you can invest in any fund is 10% and your investment must add up to 100%.

	Allocation
BGPS UK Equity Fund	%
BGPS World Equity Fund	%
BGPS Global (50:50) Equity Fund	%
BGPS Sterling Hedged World Equity Fund	%
BGPS Islamic Equity Fund	%
BGPS Emerging Markets Fund	%
BGPS Future World Fund	%
BGPS Diversified Growth Fund	%
BGPS Corporate Bond Fund	%
BGPS Index Linked Gilts Fund	%
BGPS Gilts Fund	%
BGPS Cash Fund	%
BGPS Property Fund	%
BGPS Pre-Retirement Fund	%
BGPS Retirement Income Fund	%
Total	100%

OR

Tick **one** of the managed funds below which are in the Lifestyle Programme.

Lifestyle Programmes

BGPS Annuity Lifestyle	<input type="checkbox"/>
BGPS Cash Lifestyle	<input type="checkbox"/>
BGPS Drawdown Lifestyle	<input type="checkbox"/>

Your estimated or target retirement age if not 65 (must be 55 or older)	<input type="text"/>
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Please note that you cannot choose both individual funds and the Lifestyle Programme

I hereby apply for membership of the of the Baxi Group Pension Scheme and agree to be bound by the Scheme Trust Deed and Rules.
I hereby authorise the deduction from my earnings of the amounts representing my contributions.

I understand that the Trustee of the Scheme, the Scheme administrator and the Trustee's other advisers will need to process data about me, as set out in the Privacy Notice included in the Scheme joiner pack. I also understand that I may be asked to consent to the processing of certain data in the future (e.g. health data), where applicable.

Signed	Date
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CHECKLIST FOR COMPLETING THE BAXI GROUP PENSION SCHEME APPLICATION FORM

HAVE YOU COMPLETED:

- All your personal details?
- Your nomination of beneficiaries?
- How much you want to pay?
- How you would like your contributions invested?

This must be

EITHER

Your own choice of funds adding up to 100% of your contributions

OR

A managed fund in the Lifestyle Programme

**Please note that you cannot choose both individual funds and a Lifestyle Programme.
Also you can only choose one of the pathways in the Lifestyle Programme.**

- Have you signed and dated the form?

If you have any queries about filling in the form, please contact the person responsible for HR at your site.

FOR INTERNAL USE ONLY	
Date form received	
Date from which contribution deductions commence	
Basic annual salary	
Has the date of birth been verified?	
Paypoint (code as per monthly contribution spreadsheet)	