

TRANSITION TO LIFESIGHT: SUMMARY OF KEY DATES AND DEADLINES

Date	What is happening?
1 February 2024	Current Plan members joined the Caterpillar Defined Contribution Pension Plan – LifeSight and new joiners will be enrolled into it.
Early February 2024	Welcome communications issued by the Caterpillar Defined Contribution Pension Plan – LifeSight with access details to the LifeSight account and mobile app. Trustee letter issued providing details about the asset transfer from the Current Plan to the Master Trust.
3 March 2024	First contributions in respect of current employees’ February earnings are paid into the Caterpillar Defined Contribution Pension Plan – LifeSight. You will be able to see these contributions in your LifeSight account from March onwards.
8 March 2024	Deadline to provide any completed paperwork for transferring out or retiring from the current DC Plan to Mercer.
11 March – 15 April 2024	Blackout period starts in Mercer OneView. You will have view-only access, so you can still see your fund value and other information, but you can’t make changes to your investments or transfer/take your savings.
16 April 2024	Mercer OneView will be switched off. Please ensure you print off/save any information you need from OneView such as statements BEFORE this date.
17 April – 20 May 2024	<p>Pension savings held in the current DC Plan will be transferred to the Caterpillar Defined Contribution Pension Plan – LifeSight.</p> <p>During this blackout period, you will be able to view your account and add your beneficiary details. If you are no longer making contributions to your Caterpillar pension, your balance will appear as £0 in your LifeSight account until the transfer has completed.</p> <p>Active members can make investment changes to ongoing contributions.</p> <p>Until the transfer is complete, you will not be able to:</p> <ul style="list-style-type: none"> • change your target retirement age • make changes to investments • transfer/take your savings • run quotes/statements • access modellers.
21 May 2024	The blackout period in the Caterpillar Defined Contribution Pension Plan – LifeSight is lifted.
Ongoing	<p>Once the transfer has been completed, you will receive a closing statement from Mercer letting you know your closing balance.</p> <p>After the transfer has taken place, any queries about your retirement savings account or your membership should be directed to the Caterpillar Defined Contribution Pension Plan – LifeSight. This is because the Trustee (and Mercer) will no longer have ongoing responsibility for administration of your pension savings.</p>