

ENGINEERING YOUR FUTURE

CATERPILLAR PENSION PLAN SWITCH FORM FOR ADDITIONAL VOLUNTARY CONTRIBUTIONS

To: The Trustee of the Caterpillar Pension Plan

Name: _____

National Insurance no: _____ Date of birth: _____

I confirm that I wish to:

- a) Switch* the investment of my AVC contributions
- b) Redirect** the investment of my AVC contributions
- c) Switch* and redirect** the investment of my AVC contributions

* Switch – this will change the investment of the contributions that you have paid in to date

** Redirect – this will change the investment of future contributions that you pay in

INVESTMENT OPTION	PERCENTAGE
AVIVA EQUITY FUND	
AVIVA MANAGED FUND	
AVIVA STEWARDSHIP MANAGEMENT FUND	
AVIVA PRE RETIREMENT FIXED INTEREST FUND	
AVIVA CASH FUND	
TOTAL (100%)	

DECLARATION – I authorise the Trustee of the Plan to switch my AVCs as per the instructions in this form.

Fund information can be found on the AVIVA website:

<https://www.fundslibrary.co.uk/FundsLibrary.BrandedTools/AvivaConsumer/FundCentral#Price%3APension.AvivaConsumer%3Aex-Friends%20Life%20NGP%20Corporate%20Pension>

Signed: _____ Date: _____

Please return to Premier Pensions at caterpillar@premiercompanies.co.uk

"The Trustee of the Plan has a Data Protection Privacy Policy (the "Policy") which sets out how it obtains, uses and protects personal data relating to you as a member (and to individuals connected with you) in relation to your membership of, and the benefits provided for and in respect of you, under the Plan. The Policy explains what personal data the Trustee may collect about you, how it aims to keep your personal data safe, what it may use your personal data for, who it might share personal data with and your rights regarding your personal data. Please do take the time to read the Policy, which may be found at <http://www.mycatpension.co.uk/library/privacy-notice>."