

The Westpac Banking Corporation UK Staff Superannuation Scheme



Change of Investment Form

Forenames

Surname

Date of birth

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Lifestyle

This form should only be used if you wish to override the automatic Lifestyle allocation of contributions. For a description of this please see the Scheme booklet.

Current Funds

If you wish to change the way your current fund is invested, then complete this column below with the percentage of your current fund you would like in each fund. If you do not want to change the way your current fund is invested then leave this column blank.

Fund Choices

You can EITHER be in a Lifestyle fund OR a number of Self Select funds. If you chose to be invested in a Lifestyle fund, please note that both your current and future contributions will be switched accordingly.

Future Contributions

If you wish to change the way your future contributions are to be invested, then complete this column below with the percentage of your future contributions you would like invested in each fund. If you do not want to change the way your future contributions are to be invested then leave this column blank.

Lifestyle Choices

Drawdown Lifestyle
Cash Lifestyle
Annuity Lifestyle

Current funds and
future contributions
(only select one
option)

Self Select Choices

Aon Liquidity
Aon Long Term Inflation Linked
Aon Bond Phase
Aon Progressive Growth Phase
Aon Global Equity
Aon Active Global Equity
Aon Pre-Retirement Bond
Aon Property & Infrastructure
LGIM Global Ethical Index
HSBC Amanah

Current
Funds

100%

Future
Contributions

100%

I understand that no switches will take place unless, and until, I give further instructions in writing.

Until I give further instructions in writing I confirm that future contributions into my account should be invested as shown above.

Instructions to the Trustees, to switch assets held on my behalf between funds, will be carried out by Capita as soon as practical after receipt of a correctly completed form. It is not possible to guarantee either the date or the price at which units will be switched. Your switch will be confirmed once it has taken place. **If you have not received confirmation within three weeks of submitting the form you should assume the form has not been received and contact Capita immediately.**

Signature:

Date:

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