

# New retirement date and lifestyle fund instruction

If your personal circumstances mean you need any additional support, or if you'd like a large print, Braille or audio version of this document, please visit [aegon.co.uk/additionalsupport](http://aegon.co.uk/additionalsupport) or call 03456 10 00 10 (call charges will vary).

Please read the following important information before completing this form. These notes will give you important details about the information you're being asked to provide.

- You should only complete section 1 or 2 of this form, please don't complete both.
- Traditional With-Profits investments will be switched into our 'Cash' fund at your original retirement date even if you've changed your selected retirement date above. you'll need to complete a switch instruction to select an alternative investment choice for this fund and future contributions and send it back to us at the address above.

You should complete this form if you want to change:

1. your selected retirement date.  
or
2. the date your lifestyle fund is targeting to match your existing selected retirement date.

Please complete, sign and date this form on the next page and return it to us at:

Freepost RUCB-LJKR-HHBU  
Aegon  
Sunderland  
SR43 4DU

Full name

Scheme name (if applicable)

Plan number

Scheme number (if applicable)

## 1. Change your selected retirement date

If you complete this section you don't need to complete section 2.

I want my  birthday to be my selected retirement date (maximum age is 75).

If you're currently paying regular contributions, do you want these to continue until your new selected retirement date?

Yes

No

By selecting 'No' your contributions would stop at your original selected retirement date.

You can change your contributions at any time by completing a Plan alteration form. You can find this form at in our document library under 'forms' at [aegon.co.uk/customer/pension-bond](http://aegon.co.uk/customer/pension-bond)

## 1. Change your selected retirement date continued

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You only need to complete this part of this section if you're invested in a lifestyle fund.

You're invested in a lifestyle fund which is designed to automatically change your mix of investments as you approach retirement.

Please remember, even if you're invested in this type of fund you should still review your investments on a regular basis, particularly if your financial needs or personal circumstances change. Please tick only one of the following options:

- I want the date my fund is targeting to match my new selected retirement date.
- I don't want the date my fund is targeting to match my new selected retirement date.

If the selected retirement date and the year your fund is targeting are different, this could result in the mix of your investments not being the most appropriate at your selected retirement date. That's why it's important you tell us if you want your fund to match the new retirement date so we can switch you into the appropriate version of your current lifestyle fund.

You can find more information on lifestyle funds at [aegon.co.uk/lifestylefunds](https://aegon.co.uk/lifestylefunds)

## 2. Change the date your lifestyle fund is targeting to match your existing selected retirement date

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Only complete this section if your selected retirement date doesn't match the date your fund is targeted to and you wish this to be realigned.

- I want the date my fund is targeting to match my existing selected retirement date.

Date

D	D	M	M	2	0	Y	Y
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Print name

Signature

X	X
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