

For trustees

New retirement date and lifestyle instruction

You should complete this form if you want:

1. to change your member's selected retirement date,
or
2. the date your member's lifestyle fund is targeting to match their existing selected retirement date.

Please complete, sign and date the form and return it to us at:

Freepost RUCB-LJKR-HHBU
Aegon
SUNDERLAND
SR43 4DU

You should only complete section 1 or 2. Please don't complete both.

Member name

Plan number

Scheme name (if applicable)

Scheme number (if applicable)

1. Change your member's selected retirement date

Please make this member's birthday their selected retirement date (maximum age is 75).

If your member is invested in a lifestyle fund, please tick only one of the following options to let us know what they want to do with their lifestyle fund's retirement date:

The lifestyle fund retirement date should match the new selected retirement date.

or

The lifestyle fund retirement date should remain as it is, matching the pension date or previous selected retirement date, as applicable.

If the selected retirement date and the year your member's fund is targeting are different, this could result in the mix of their investments not being the most appropriate at their selected retirement date. That's why it's important they tell us if they want their fund to match the new retirement date as we'll then switch them into the appropriate version of their current lifestyle fund. You can find more information on lifestyle funds at aegon.co.uk/lifestylefunds

2. Change the date your member's lifestyle fund is targeting to match their existing selected retirement date

The lifestyle fund retirement date should match their existing selected retirement date.

Date (dd/mm/yyyy)

Print name

Trustee's signature

