

**TO BE COMPLETED BY THE EMPLOYEE**

Once completed this form should be sent to your Pension Contact for forwarding to Gallagher at:  
The Emerson UK Pension Plan, Gallagher (Manchester), PO Box 324, Mitcheldean, GL 14 9BJ.

**Part A Personal Details**

Full Name:	<input type="text"/>		
Date of Birth:	<input type="text"/>	NI Number:	<input type="text"/>
Date Joined Company:	<input type="text"/>	Date Joined the Plan:	<input type="text"/>
Target Retirement Age:	<input type="text"/>	E-mail:	<input type="text"/>
Address:	<input type="text"/>		

**Part B Your Investment Options**

Please invest my funds as follows by either choosing one of the two Lifestyle options:

		Tick to Select
<input type="text" value="Legal &amp; General"/>	<input type="text" value="Emerson Default Lifestyle Fund"/>	<input type="checkbox"/>
Or		
<input type="text" value="Legal &amp; General"/>	<input type="text" value="Emerson Annuity Lifestyle Fund"/>	<input type="checkbox"/>
Or		
<input type="text" value="Legal &amp; General"/>	<input type="text" value="Emerson Cash Lifestyle Fund"/>	<input type="checkbox"/>

Or by choosing the percentage of your contributions you wish to invest in the specific Legal and General funds

Investment Fund	Percentage	Investment Fund	Percentage
<input type="text" value="EUKPP Global Equity Fund"/>	<input style="width: 50px;" type="text" value="%"/>	<input type="text" value="EUKPP World (ex-UK) Equity Fund"/>	<input style="width: 50px;" type="text" value="%"/>
<input type="text" value="EUKPP UK Equity Fund"/>	<input style="width: 50px;" type="text" value="%"/>	<input type="text" value="EUKPP Shariah Global Equity Fund"/>	<input style="width: 50px;" type="text" value="%"/>
<input type="text" value="EUKPP Diversified Fund"/>	<input style="width: 50px;" type="text" value="%"/>	<input type="text" value="EUKPP Fixed-Interest Bond Fund"/>	<input style="width: 50px;" type="text" value="%"/>
<input type="text" value="EUKPP UK Corporate Bond Fund"/>	<input style="width: 50px;" type="text" value="%"/>	<input type="text" value="EUKPP All Stocks Gilts Fund"/>	<input style="width: 50px;" type="text" value="%"/>
<input type="text" value="EUKPP Inflation-Linked Gilts Fund"/>	<input style="width: 50px;" type="text" value="%"/>	<input type="text" value="EUKPP Cash Fund"/>	<input style="width: 50px;" type="text" value="%"/>
		<b>TOTAL</b>	<b>100%</b>

**Unless a form is received contributions will be invested in the default lifestyle investment option**

**Part C Former Opt Out**

I am rejoining the Plan after having previously been a member of the Emerson UK Pension Plan	Please Tick	
	YES <input type="checkbox"/>	NO <input type="checkbox"/>

**Part D Lifetime Allowance**

I hold HMRC Primary or Enhanced Protection for my Pension Benefits.	Please Tick	
	YES <input type="checkbox"/>	NO <input type="checkbox"/>

**Part E Your Contribution Rate**

Please indicate the level of contributions to be paid, expressed in percentage terms.

<u>Your Regular Contribution</u>	<u>Employer Regular Contribution</u>	<u>Additional Voluntary Contributions*</u>
<input type="text"/> %	<input type="text"/> %	<input type="text"/> % or <input type="text"/> £

\* Contribution scales will be confirmed by your on site Pension or HR Contact

Contributions will be deducted under the Emerson SMART Contribution Arrangement.

If you wish to opt-out please tick here

**Part F Member Declaration**

I confirm I wish to join the Emerson UK Pension Plan. I understand that the above information will be used for operating the Plan in my interests, and as such it may be made available to third parties authorised by the Trustee of the Emerson UK Pension Plan to process my data. I have been made aware of my rights under the Data Protection Act as outlined in the Plan Booklet.

Signature: \_\_\_\_\_ Date: \_\_\_\_\_

Name: \_\_\_\_\_ Tel No: \_\_\_\_\_

**Part G Site Pension Contact Statement**

I confirm that the member's personal information and contribution rates have been checked to our records and are correct.

Plan Reference Code \_\_\_\_\_ Life Assurance YES / NO

Signature: \_\_\_\_\_ (To be signed by an authorised Pension/HR Contact)

Name: \_\_\_\_\_ Date: \_\_\_\_\_

The information provided will be processed by Gallagher for purposes only associated with the Emerson UK Pension Plan and will be used in accordance with its policies and the Trust Deed & Rules and the General Data Protection Regulation.