

Policy number:

Equitable Life

# Investment Choice Form

## Pension policies

Action for you to take	See booklet
Get to know the Investing by Age strategy, the automatic investment option for your policy. Consider whether this is suitable for your needs.	Part 1 Section 3
If you want to select your own individual Unit-Linked funds to invest in: <ul style="list-style-type: none"><li>▶ get to know the funds available to you</li><li>▶ assess how much risk you want to take with your investment before making a decision</li></ul>	Part 2 Sections 1 – 3
Decide whether you need guidance or advice before you make your choice.	Part 1 Section 6
Complete the Investment Choice Form	
▶ <b>Section A:</b> choose the fund(s) you wish to invest in	Part 1 & Part 2
▶ <b>Section B:</b> choose your investment timeline	Part 1 Section 4
▶ <b>Section C:</b> sign and date the declaration	
Return the form to us in the pre-paid envelope provided by 13 December 2019.	

### Where can I get help?

If you need further details about the Proposal and what it might mean for you, please read the recently issued Decision Pack and Personal Illustration where this is set out in detail.

Call **0330 159 1530** (or **+44 1296 386 242** if overseas) from 9am to 5pm or write to us at **Equitable Life, Walton Street, Aylesbury, Buckinghamshire, HP21 7QW**. We can help you understand what you need to consider when making an investment decision, or if you want to discuss other options available under your policy.

For details of the additional support available to you, see **Part 1 of your Investment Choice Pack, Section 6 'More help with your investment choice'**.

#### What happens if I take no action and the Proposal goes ahead?

Your policy would be invested in a secure cash investment for six months after the transfer to Utmost Life and Pensions. In the following six months, it would then gradually move to the Investing by Age strategy. You could decide to make an investment choice at any time in the future by calling **0330 159 1530** (or **+44 1296 386 242** if overseas) from 9am to 5pm.

#### What happens if the Proposal does not go ahead?

The value of your With-Profits investments would not be increased, your investment guarantee would remain, your policy would not convert from With-Profits to Unit-Linked or transfer to Utmost Life and Pensions. You would remain invested in the Equitable With-Profits fund as you are today.

The outcome of the vote will be published on the Equitable Life website in November. If you prefer to wait until you know the outcome of the vote before making an investment choice, we encourage you to seek any help or advice you may need before the end of November so that you are ready to make your choice once the outcome is known.

# Investment Choice Form

## Pension policies continued

### Important information

Before you make a decision, you should read the information in Part 1 and Part 2 of your Investment Choice Pack, and consider your personal financial circumstances, goals, and attitude to taking financial risks and potential loss. These investment choices only apply to your With-Profits investments when they convert to Unit-Linked. Any existing Unit-Linked investments will be unchanged.

Full name	
Address	
Policy number	Pre-populated
Telephone number	
Email address	

### Section A: Your investment fund choice

Tick one option

Investing by Age strategy Tick if this is your choice, then go to Section B of this form	✓	See booklet
Self-select funds Tick if this is your choice, then continue to select from the funds listed below		Part 1 Section 3
		Part 2 Sections 2 & 3

If you're choosing self-select funds, you can invest in one or more of the following funds. See **Part 2 of your Investment Choice Pack** for detailed information about self-select funds.

**The total of all your investment choices must add up to 100%.**

Self-select funds	% to invest
Investing by Age strategy (if you wish to invest a proportion of your savings here as well as in other funds)	
Multi-Asset Cautious	
Multi-Asset Moderate	
Multi-Asset Growth	
Money Market	
Sterling Corporate Bond	
UK Government Bond	
Managed	
UK FTSE All Share Tracker	
UK Equity	
Asia Pacific Equity	
European Equity	
Global Equity	
US Equity	
<b>The total in this column must add up to 100%</b>	<b>100%</b>

## Section B: Your investment timeline options

The same investment timeline will apply to all funds you select. If you do not select a timeline, the six month transition timeline will automatically apply.

Tick one option

	✓	See booklet  <b>Part 1 Section 4</b>
<b>Six month transition:</b> Fully invested within six months		
<b>Three month transition:</b> Fully invested within three months		
<b>One month transition:</b> Fully invested within one month		

## Section C: Declaration

Please sign and date below to confirm your instructions to invest your money in the funds and timeline you have chosen.

Print name		
Signature		Date of signature:
<b>For joint grantees only:</b>		
Print name (if joint grantees both must sign)		
Second signature (if required)		Date of signature:

**Return this form in the prepaid envelope provided to Equitable Life, Walton Street, Aylesbury, Bucks, HP21 7QW by 13 December 2019** in order for your instructions to be processed at the Implementation Date, if the Proposal goes ahead. We will still accept forms after this date but your instructions may be processed after the Implementation Date.

For security and training purposes, telephone calls may be recorded.

Authorised by the Prudential Regulation Authority and regulated by the Financial Conduct Authority and the Prudential Regulation Authority. The Equitable Life Assurance Society is a mutual society registered in England No. 37038.  
Registered Office: Walton Street, Aylesbury, Buckinghamshire, HP21 7QW, United Kingdom.

