

MGM Personal Pension Plan

Group Personal Pension Plan Transaction Form

Existing Plan Number

Employer Name

This form is for redirection and switching of investments. Please complete a GPP Contributions Schedule for changes to contributions.

Please read all the notes and complete the form fully, ticking boxes where appropriate

NOTES

1. The Finance Act 2004 and associated legislation has altered the basis on which this Plan is administered. The MGM Personal Pension Plan is now a registered pension scheme under the Finance Act 2004.
2. The scheme administrator is MGM Advantage and the trustees are MGM Assurance (Trustees) Limited.
3. Redirection of future contributions and switching of existing units cannot be backdated. The earliest effective date will be the date of receipt of this form by MGM Advantage.

Section A - Personal details

Surname

First names

Title Mr/Mrs/Ms/Miss/Other (please specify)

Address

Postcode

Telephone number Home: Business:

Email address

Date of birth

National Insurance Number

Marital status married civil partnership divorced single widowed

Section B - Redirection of future contributions

Future contributions can be redirected to other funds, but contributions already made to the date of the change will remain in the funds originally chosen, unless Section C switching of existing units is also completed.

Name of MGM Advantage fund	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	Total
%	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	100%

Only whole percentages can be accepted

Effective date of redirection (see note 3)

Section C - Switching of existing units

The value of existing units can be switched to other funds. Future contributions will purchase units in the funds originally chosen, unless Section B redirection of future contributions is also completed.

Existing Fund	% of value	New fund	Existing fund	% of value	New fund
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

Effective date of switch (see note 3)

Member request

I request MGM Advantage to alter the investment of contributions as shown in this form.

Member Signature

Date



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