

Growth Plan Series 4 Employee Application Form

Membership number, to be completed by TPT Retirement Solutions:

M

Employees are required to fully complete sections 1 – 4 and sign the declaration.

1 | Your details

Title: Male Female

Surname:

Forename(s):

Address:

..... Postcode:

Email:

Telephone Number: Date of Birth:

Status: single married widow(er) divorced civil partner

National Insurance Number:

Please advise TPT of any future changes of address or status.

The information on this form will be treated in the strictest confidence. Personal data which is held will be processed in line with the Data Protection Act 1998.

The Data Controller is Verity Trustees Ltd.

2 | Previous pension arrangements

Have you ever previously been a member of TPT? Yes No

If yes, please provide the Membership Number, if known: **M**

3 | Investment choice

Selected Retirement Date (SRD)

Please indicate your intended retirement age which may be any date after age 55:

Now, please choose EITHER A) Default Target Date Fund Investment Option OR B) provide your own Investment Option (Self-select):

If no option is selected the Default Target Date Fund Investment Option will apply.

A) Default Target Date Fund Investment Option

The Target Date Funds comprise a series of funds of different 'vintages' (e.g. 2038 – 2040), intended to match the selected retirement date of the member. Each fund is managed with the aim of giving the member the highest possible pension income after taking into account the number of years over which contributions will be made to their fund. The funds invest across a range of asset classes and the mix of assets in the fund will change over the life of the fund.

I wish the Default Target Date Fund Investment Option to apply to my personal fund (please tick here)

OR B) Self-select Investment Option

I wish the Self-select Investment Option to apply to my personal fund and have indicated my selected investment funds below (please tick here)

Index-Linked Gilts Fund % Global Equity Fund %

Bond Fund % Cash Fund %

Socially Responsible Investment Fund % Ethical Target Date Fund %

Property Fund % Diversified Growth Fund %

Your choices must add up to 100%.

Please note: The return for each investment fund is directly related to the performance of the asset classes in which it is invested. The value of assets can go down as well as up. Past performance is not a guarantee of future performance.

4 | Death benefits

Please note: The cost of providing additional lump sum cover is deducted from contributions and increases with age. Your employer determines the level of life assurance cover. Please check with your employer the level of cover in place.

Death Benefits – before retirement (lump sum)

A return of your personal fund is payable on death in addition to your life assurance lump sum.

Payment of lump sum death benefits

Please nominate below who you wish to receive the lump sum benefit on your death. There is no limit to the number of beneficiaries (see notes below). Use an extra sheet if required.

Full Name: Relationship:

Date of Birth: Proportion: %

Full Name: Relationship:

Date of Birth: Proportion: %

Notes on death benefits

1. Lump sum death benefit

- (a) You may nominate any one or more persons or organisations to receive this. You must use the name of a person or organisation and not your 'Estate' or the title 'Executor' or 'Administrator'.
- (b) Any nomination will be revoked automatically by the death of the person(s) nominated or by your later marriage, civil partnership, divorce or dissolution of a civil partnership. If you wish your original nomination to stand you must confirm this in writing to TPT.
- (c) You may change your nomination at any time. Please obtain a further form from the GP4 website www.gp4dc.org.uk if you wish to do so.
- (d) TPT has discretion over who is to receive the benefit and, in exceptional circumstances, where no information is available, reserves the right to retain all or part of the value of the benefit within the assets of the Plan.

Employee's declaration

I hereby apply to become a member of the Growth Plan, and I agree to be bound by the terms and conditions of the Growth Plan (GP) as set out in the Trust Deed and Rules. I confirm that I have read the information on the Growth Plan 4 website and understand the value of my fund is subject to market conditions and may go up or down depending on my investment choice and fund performance.

I consent to the processing of the data included in this form and any further personal information supplied by me or my employer.

I authorise my employer to deduct the agreed pension contributions from my salary (if appropriate).

Signed: Date:

Full Name:

In order that we can send you a pension forecast that includes information about your State Pension, we need to get some information about you from the Department for Work and Pensions (DWP). To get that information we need to disclose your personal details to the DWP.

The information we get from the DWP will be used only for the purposes of providing you with a forecast of your pension rights.

If you do not wish us to contact the DWP for this information, please tick this box
As a result of this, the pension forecast you receive from us will not include State Pension information.

Employers are required to fully complete this page and sign the declaration.

5 | Employer details

Name of Organisation:

Employer Reference Number: **E** Normal Retirement Age:

Employer Contribution Rate: % Employee Contribution Rate: %

(Where a Salary Sacrifice arrangement is in place please enter 0 in the Employee Contribution Rate section and the total contributions in the Employer Contribution Rate.)

Date employee joined employment:

Payroll Number:

Contractual hours per week: Standard full-time hours:

Date of joining the Plan: Annual Pensionable Salary: **£** p.a.

Underwriting declaration

Certain employees may be subject to medical underwriting. Please answer the following three questions:

1. Is the employee 70 or over at the date they have applied to join the Plan?
Yes No
2. Is the employee off work sick on the date they have applied to join the Plan?
Yes No
3. Would the employee be entitled to a lump sum death benefit in excess of the free cover limit* (currently £1 million) if they died in service?
Yes No

*This is calculated by multiplying the pensionable salary by the life cover multiple selected by the employer.

Please complete the declaration on page 6.

Employer's declaration

I certify that the applicant is an employee of our organisation and I agree to ensure that contributions are paid to TPT on behalf of this employee.

I understand contributions must be received by TPT within legal time limits.

Signed: Date:

Full Name:

Position:

Email:

The completed form should be sent to the DC Administration Team at the address below. Any queries please call **0345 072 6780** or email **TPTenquiries@jltgroup.com**