

Application Form 2008 Section

Rolls-Royce Money Purchase Pension Plan ('the Plan')

Administered by Friends Life



Rolls-Royce

Part A – Personal Details

Please complete this form in **BLOCK capitals**

Surname	<input type="text"/>	National Insurance Number	<input type="text"/>
Forenames	<input type="text"/>	Date of Birth	<input type="text"/>
Address	<input type="text"/>	Payroll Number	<input type="text"/>
	<input type="text"/>	Date Joined Company	<input type="text"/>
	<input type="text"/>	Telephone	<input type="text"/>
Postcode	<input type="text"/>	Email	<input type="text"/>

Part B – Investment Instructions

Please complete only **Section 1 OR Section 2** (complete Section 2 if you want to choose your own funds, OR Section 1 if you'd rather pick one of the Lifestyle Investment Programmes – you can't choose both).

Section 1 – Lifestyle Investment Programmes

- Annuity – Higher Risk Lifestyle (tick box)
- Annuity – Medium Risk Lifestyle (tick box)
- Drawdown – Higher Risk Lifestyle (tick box)
- Drawdown – Medium Risk Lifestyle (default option) (tick box)
- Cash – Higher Risk Lifestyle (tick box)
- Cash – Medium Risk Lifestyle (tick box)

Please also circle your target retirement age below:

55	56	57	58	59	60	61	62	63	64	65	66	67	68	69	70	71	72	73	74	75
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- Please be assured the target retirement age is not taken as your agreement to retire at this age and you will be able to amend this age at any time before the final lifestyle switching begins.
- If you don't specify your target retirement age, we will use age 65 for Lifestyle switching purposes.
- If you choose this option you cannot invest in any other funds

Section 2 – Self-Select Funds

Fund	Percentage % (use whole % only)
FL MyM BlackRock (10:80:10) Currency Hedged Global Eq (Aq C)	
FL MyM BlackRock UK Equity Index (Aquila C)	
FL MyM Legal & General (PMC) Pre-Retirement	
FL MyM BlackRock Over 5 Year Index-Linked Gilt Index (Aq C)	
FL MyM Diversified Growth (50:50 Standard Life GARS/Insight BOF)	
FL MyM Legal & General (PMC) Retirement Income Multi-Asset	
FL MyM BlackRock Institutional Sterling Liquidity	
Total	100%

- I understand that all of my investments will be allocated as indicated in Part B.
- Investment instructions will be effective as soon as possible following receipt of a fully completed form by the Pensions Team.
- You can amend your fund choice by contacting Friends Life after you have become a member of the 2008 Section of the Plan. You can change funds whenever you like, without penalty.
- For further information please refer to the Booklet, The guide to Understanding your Plan and the Investment Guide.

Part C – Declaration and Further Information

This form is designed to confirm your agreement to joining the 2008 Section of the Rolls-Royce Money Purchase Pension Plan ('the Plan'). You must sign, date and return this form if you wish to join the Plan. By signing and completing this form:

- You apply to join the Plan.
- You agree that Rolls-Royce may provide Friends Life with your personal details necessary for them to administer the Plan.
- You confirm that you have received and read the Plan literature.
- You understand that if you have not joined the scheme at the first opportunity of doing so, the payment of the Death in Service benefit is subject to medical underwriting completed by the Plan's insurer.
- You understand that your Employer will deduct from your gross contractual pay an amount equivalent to the required member contribution of the Plan (see the 2008 Section Booklet and The Guide to understanding your Plan).
- If at any time, you do not participate in the PaySave arrangement, you authorise your Employer to deduct from your Pensionable Pay the employee contributions payable under the Plan (see the 2008 Section Booklet and The Guide to understanding your Plan).
- You understand that your Employer will also pay contributions based on your age and your Pensionable Pay (see the 2008 Section Booklet and The Guide to understanding your Plan). If you would like to pay more than the specified level of contributions you need to complete an AVC application form, which is available to download from the Reward & Performance section of the 'Your HR' portal (peoplenet) or on request from the Pensions Team.
- You understand that your Employer will not contribute more than the amounts specified in the 2008 Section Booklet and The guide to understanding your Plan.
- You declare that the statement on this application is to the best of your knowledge true and complete and that you have not withheld any material information.

Other Information

- I am entitled to other pension benefits from another pension arrangement YES/NO
- I am a Controlling Director (if yes, a Controlling Director's Form must be attached to this application) YES/NO
- I have applied to HM Revenue & Customs (HMRC) for Lifetime Allowance Protection (if yes a copy of the relevant certificate(s) must be attached to this application) YES/NO

Data Protection

- I consent to Friends Life and Rolls-Royce plc seeking any information from the administrators of any pension arrangements to which I am, or have been, a member and I authorise the giving of such information.
- Friends Life and the Trustees of the Plan will use the personal information given on this form, and any other information from you or the Trustees, their advisors or your employer, for administering the Plan. Friends Life will also use the information to maintain records under the insurance policy or annuity contract (taken out in connection with the Plan) and to make payment under it.
- Friends Life may pass the information to other companies both within and outside the Friends Life Group. Friends Life may involve contractors in administration, record keeping, paying benefits and storing and destroying data. The information may also be passed to the Trustees and their advisors, The Department for Work & Pensions, HM Revenue & Customs and any other relevant Government Departments, agencies or other public bodies.
- You have the right to request that the Trustees or Friends Life inform you about any personal data we hold about you (for which we may charge a small fee) and to have any inaccuracies corrected.
- I consent to the information about me being used as described above.

Signed

Date

Disclaimer

The Rolls-Royce Pensions Team does not accept responsibility for lost or mislaid pension application forms, and as a result, cannot backdate membership before the next available payroll.

Once employment has commenced, it is the **employee's responsibility** to ensure the pension application form has been processed by checking their salary payslip. This should show a pension contribution either via a PaySave deduction under the Gross Pay section, or if the employee is not a participant in PaySave, then via the relevant amount in the deductions column.

Please note, that if you are being paid under an 'All-inclusive' arrangement, the fact that you have a 'Money Purchase' pay element does not automatically mean you are a member of the Rolls-Royce Money Purchase Plan – completion of an application form is required in all cases.

If you require any clarification on your membership of the Plan, please contact the Pensions Team on 01332 333335.

Please complete this form and send to: Pensions Team, JH-19, Rolls-Royce plc, PO Box 31, Derby DE24 8BJ