

Application Form

Rolls-Royce Retirement Savings Trust ('the Plan')

Administered by Aviva



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 – Declaration and Further Information

This form is designed to confirm your agreement to joining the Rolls-Royce Retirement Savings Trust ('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 and understand your contributions will be invested initially in the default investment fund; The Medium Risk Drawdown Lifestyle Programme. Once you have been enrolled you can change your investment choice by logging into your Aviva online account.
- You agree that Rolls-Royce may provide Aviva 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 and the Permanent Health Insurance benefit is subject to medical underwriting completed by the 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 Member Guide).
- 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 Member Guide).
- You understand that your Employer will also pay contributions based on your Pensionable Pay (see the Member Guide). If you would like to pay more than the specified level of contributions you can pay AVCs by contacting the Pensions Team.
- You understand that your Employer will not contribute more than the amounts specified in the Member Guide.
- 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 Aviva 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.
- Aviva 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. Aviva 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.
- Aviva may pass the information to other companies both within and outside the Aviva Group. Aviva 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 Aviva 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 Retirement Savings Trust – 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 the Pensions Team: by post; JH-19, Rolls-Royce plc, PO Box 31, Derby DE24 8BJ
by email; pensions.web@rolls-royce.com**