

Additional Voluntary Contributions (AVC) Form

SEI Master Trust

Cambridge University Assistants' Defined Contribution Pension Scheme

To be completed by the employee. Please complete in BLOCK letters.

Employer

Section: 1 Personal Details

Mr Miss Mrs Ms Dr Other: _____

Surname

Forenames (in full)

Employee Number

NI Number

Section: 2 Retirement Age

Please select a retirement age. This will allow your investment strategy to be aligned with your chosen date and personalise your benefits information. You can change this date at any time in the future.

Please see Hybrid Fact Sheets 2, 11 and 12.

Scheme retirement age of 65

Yes No

OR

Selected retirement age (between 55 and 75)

Yes No (If No, then Age: _____)

Section: 3 AVC Contribution

Indicate the amount of your salary that you would like to contribute as a voluntary contribution, either as a percentage or a fixed amount.

Please see Hybrid Factsheet 10.

Percentage of pensionable pay per payroll _____% OR Lump sum payment £ _____

Section: 4 Investment Option

Please indicate the percentage of your contribution and/or the Company contribution you would like invested in the funds below. Please ensure the total adds up to 100%.

Note: you must invest in either the lifestyle strategy **OR** SEI Funds. You may not invest in both. If you do not indicate any investment choices, or this section is not fully completed, pension contributions will automatically be invested in the **Default Lifestyle Strategy** and your retirement age will be set to age **65**.

4.1 Lifestyle strategies

Please tick **one** if you have not selected any of the funds shown to the right in section 4.2.

- Default strategy
- Alternative strategy

OR

4.2 Choose one or more investment funds

- SEI UK Core Fixed Interest Fund _____%
- SSgA Sterling Liquidity Fund _____%
- SEI Defensive Fund _____%
- SEI Moderate Fund _____%
- SEI Core Fund _____%
- SEI Growth Fund _____%
- SEI Aggressive Fund _____%
- SSgA Global Equity 50:50 Index Fund _____%
- Total *(Total amount must add up to 100%)* **100** %

Section: 5 Declaration

I understand that the above information will be used for the purposes of administering my pension within the Scheme and for operating the Scheme in my interests and as such the information may be made available to third parties authorised by the Trustee of the Scheme, including professional advisers and other service providers, to process my data. I have been made aware of my rights under the Data Protection Act 2018, including where I can obtain a copy of the Trustee’s Privacy Notice. I also understand that my personal contributions and my Employer contributions will be invested in the Scheme’s default investment option and will remain there unless I instruct otherwise.

Signature

Date

Please return this form to:

University of Cambridge
Pensions Section
Greenwich House
Madingley Road
Cambridge
CB3 0TX