

# Switch of Investments 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 Future Contributions

Please invest the contributions deducted from my salary and/or those paid by the Company on my behalf as shown below.

**Note:** you must invest in either a lifestyle strategy **OR** a SEI Fund. You may not invest in both.

#### 2.1 Lifestyle strategies

Please tick **one** if you have not selected any of the funds shown to the right in section 2.2.

- Default strategy
- Alternative strategy

**OR**

#### 2.2 Choose one or more investment funds

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

## Section: 3 Existing Assets

Please invest my current investment account as shown below.

**Note:** you must invest in either a lifestyle strategy **OR** a SEI Fund. You may not invest in both.

### 3.1 Lifestyle strategies

Please tick **one** if you have not selected any of the funds shown to the right in section 3.2.

- Default strategy
- Alternative strategy

OR

### 3.2 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 Growth Fund \_\_\_\_\_%
- SSgA Global Equity 50:50 Index Fund \_\_\_\_\_%
- Total *(Total amount must add up to 100%)* 100 %

## Section: 4 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