

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 _____

Email Address _____

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 Fact Sheet 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 below in section 4.2.

Default strategy Alternative strategy

OR

4.2 Choose one or more investment funds

Asset allocation funds:

- SEI Defensive Fund _____ %
- SEI Moderate Fund _____ %
- SEI Core Fund _____ %
- SEI Growth Fund _____ %
- SEI Aggressive Fund _____ %

SEI investment funds:

- SEI Factor Allocation
Global Equity Fund _____ %
- SEI UK Equity Fund _____ %
- SEI Japan Equity Fund _____ %
- SEI Global Select Equity Fund _____ %
- SEI European Ex-UK Equity Fund _____ %
- SEI Emerging Markets Equity Fund _____ %
- SEI Pan European Small Cap Fund _____ %
- SEI Asia Pacific
(Ex-Japan) Equity Fund _____ %
- SEI US Large Companies Fund _____ %
- SEI US Small Companies Fund _____ %
- SEI UK Core Fixed Interest Fund _____ %
- SEI Global Fixed Income Fund _____ %
- SEI Global Opportunistic
Fixed Income Fund _____ %

External funds:

- SSgA UK ESG Screened
Index Equity Sub-Fund _____ %
- SSgA Global (50/50) ESG
Screened Index Equity Sub-Fund _____ %
- SSgA UK Conventional Gilts
Over 15 Years Index Fund _____ %
- SSgA UK Index Linked Gilts
Over 5 Years Index Fund _____ %
- SSgA Sterling Liquidity Sub-Fund _____ %
- SSgA Sterling Non-Gilts
Bond All Stocks ESG Screened
Index Sub-Fund _____ %
- SSgA All World ESG Screened
Index Equity Sub-Fund _____ %
- BlackRock Market
Advantage Strategy Fund _____ %
- Columbia Threadneedle
UK Property Fund _____ %
- Columbia Threadneedle
Responsible UK Equity 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
Maddingley Road
Cambridge
CB3 0TX