

Variable Group AVC Including Millennium Series



Member application

Aviva Account Number

How to fill in this form

This form needs to be completed if:

- ▶ you are applying to become a member of the plan, or
- ▶ you wish to change your existing payments
Please ask your plan administrator for further details

The form must be completed by the Trustees of the plan, as well as the employee.

Please write in the boxes provided in **black ink** using BLOCK CAPITALS.

A copy of the completed application and policy conditions are available on request.

All relevant sections must be completed for us to set up the plan. If any are not completed it will delay the application as we will have to ask for the missing information separately.

Your birth certificate and your marriage or civil partnership certificate should accompany this form (unless they have been seen on a previous occasion) and be passed to the Trustees or plan administrator. The certificate(s) will be returned to you after examination.

Plan details
For completion by the Trustees

▶ Plan name

▶ Plan number

▶ Has birth certificate been seen and verified? yes no

▶ Has marriage/civil partnership certificate been seen and verified? yes no

Please complete the Trustees' Declaration at the end of the form

Employee details
For completion by the employee

▶ Full name
Title Mr Mrs Miss Ms Other (e.g. Dr)

Forename(s)

Surname

▶ Email address

▶ Are you: Male Female

▶ Date of birth Day Month Year

▶ National Insurance Number

▶ Marital/civil partnership status

▶ Date of joining plan/
Date of change Day Month Year

Employee payments

- ▶ Do you wish to: join the plan? or change your payments?
- ▶ Level payments £ monthly or £ yearly
- OR
- ▶ Percentage of pensionable earnings %
- Monthly earnings or Yearly earnings
- Yearly pensionable earnings £
- These payments will vary in line with your earnings.
- ▶ Single payment £
- Only available if you are making or have made regular payments

Investment approaches: Lifestyling, Self-style and Phased Switching

Only complete this section if the Trustees have allowed you to choose your own investments.

Members who are joining with ten years or less to retirement are not eligible for Lifestyling or Self-style. Members who are joining with five years or less to retirement are not eligible for Phased Switching. Members who are not eligible for their chosen investment approach, please go to the section Investment Choice to select the funds you wish to invest in. You can find out details of all the options available to you by visiting aviva.co.uk/retirement/fund-centre/other-investment-options.html

- ▶ Please indicate which approach you have chosen:
Tick one box only
- Aviva Mixed Investments Universal Lifestyle approach
- Aviva Global Shares Universal Lifestyle approach
- Aviva Self-style Universal approach Please complete Self-style section below.
- Aviva Phased Switching Universal approach Please go to the section 'Investment Choice' below to select the funds you wish to invest in before Phased Switching starts.

▶ Self-style approach

Please refer to our fund centre at aviva.co.uk/pensionfund-info for the choice of funds available. The only funds available under Self-style are funds without an additional yearly charge. You can select a maximum of two funds.

At the start of the Self-style approach please invest all payments as follows:

Fund name %

Fund name %

Investment choice

Only complete this section if the Trustees have allowed you to choose your own investments.

You don't need to complete this section if you have selected a Lifestyle or Self-style.

▶ Existing plan member

I am already a plan member and wish to keep investing my payments in the same funds as at present.

If you wish to change the funds you currently invest in, or invest future payments in different funds, please complete a 'Pension Fund Investment Instructions' form, available from the plan administrator.

▶ New member

I am applying for membership and wish to invest my payments in the following funds.

Please refer to our fund centre at aviva.co.uk/pensionfund-info for the choice of funds available. Write the full name of the chosen fund(s), including the name of the provider, clearly in the space(s) provided. You may choose up to six funds. Enter your chosen percentages, using whole percentages only. These must add up to 100%.

Investment choice

Continued

Fund name	Allocation Percentage
Total	100%

Financial Crime

To verify your identity and prevent financial crime, your information may be used by any company within the Aviva group. It may also be shared with third parties who provide services to us, and any other organisations, where required to by law and regulation.

We may record any searches carried out. These, and any suspicion of financial crime, may be used to help other companies with verification and identification. The search isn't a credit check and your credit rating shouldn't be affected.

Privacy Notice

Aviva Life & Pensions UK Limited is the main company responsible for your Personal Information (known as the controller). Aviva Pension Trustees UK Limited is an additional controller as trustees of the Aviva Personal Pension Scheme.

We collect and use Personal Information about you in relation to our retirement and investments products and services. Personal Information means any information relating to you or another living individual who is identifiable by us. The type of Personal Information we collect and use will depend on our relationship with you and may include more general information (e.g. your name, date of birth, contact details) or more sensitive information (e.g. details of your health).

Some of the Personal Information we use may be provided to us by a third party. This may include information already held about you within the Aviva group, information we obtain from publicly available records, third parties and from industry databases, including fraud prevention agencies and databases. Where you are a member of an occupational or workplace pension scheme, or if you join a savings product through your employer, we may obtain information from, and share information with, the employer who set up your pension or savings product, the trustees of the pension and any third parties who are providing services to you or them.

This notice explains the most important aspects of how we use your Personal Information, but you can get more information by viewing our full privacy policy at aviva.co.uk/privacypolicy or requesting a copy by writing to us at: The Data Protection Team, Aviva, PO Box 7684, Pitheavlis, Perth PH2 1JR. If you are providing Personal Information about another person you should show them this notice.

We use your Personal Information for a number of purposes including providing our products and services and for fraud prevention.

We also use profiling and other data analysis to understand our customers better (e.g. what kind of content or products would be of most interest) and to predict the likelihood of certain events arising (e.g. to assess risk or the likelihood of fraud).

We may sometimes make decisions using automated decision making. More information about this, including your right to request that certain automated decisions we make have human involvement, can be found in the 'Automated Decision Making' section of our full privacy policy.

We may use Personal Information we hold about you across the Aviva group for marketing purposes, including sending marketing communications in accordance with your preferences. If you wish to amend your marketing preferences please contact us at contactus@aviva.com or by writing to us at: Aviva, Freepost, Mailing Exclusion Team, Unit 5, Wanlip Road Ind Est, Syston, Leicester, LE7 1PD. More information about this can be found in the 'Marketing' section of our full privacy policy.

Your Personal Information may be shared with other Aviva group companies and third parties (including service providers and regulatory and law enforcement bodies). We may transfer your Personal Information to countries outside of the UK but will always ensure appropriate safeguards are in place when doing so.

You have certain data rights in relation to your Personal Information, including a right to access Personal Information, a right to correct inaccurate Personal Information and a right to erase or suspend our use of your Personal Information. These rights may also include a right to transfer your Personal Information to another organisation, a right to object to our use of your Personal Information, a right to withdraw consent and a right to complain to the data protection regulator. These rights may only apply in certain circumstances and are subject to certain exemptions. You can find out more about these rights in the 'Data Rights' section of our full privacy policy or by contacting us at dataprt@aviva.com

The Aviva group and its agents would like to contact you from time to time to provide you with updates and offers for Aviva's products and services tailored to you by direct marketing, by post, phone, email or text.

Tell us if you do not want to hear from us

How we keep you informed

You can tell us below if you would prefer not to hear about Aviva products, services, and promotions. You can always tell us if you change your mind.

- Post
- Email
- Telephone
- SMS/Text

Declarations

Employee's Declaration

- I. I apply to become a member of the Variable Group AVC plan and acknowledge that the terms and conditions apply.
- II. I understand that the information I have supplied will be used in connection with the plan and I confirm that, to the best of my knowledge and belief, the statements on this application and all other declarations relating to it are true and complete.
- III. I understand that no benefit may be assigned, commuted or surrendered, except in accordance with the scheme rules.
- IV. I authorise Aviva to obtain from the Trustee of any pension arrangement, or any insurance company with whom such a scheme or arrangement has been effected, any information necessary in connection with my membership of this pension scheme.
- V. I authorise my employer to deduct my regular payments, if any, from my earnings.

▶ Employee's signature

▶ Date

Day

Month

Year

Trustees' Declaration

- I. We submit this employee for membership of the Variable Group AVC plan.
- II. We have checked the statements on the Application and, to the best of our knowledge and belief, the information is true and complete.
- III. We authorise Aviva to obtain from the Trustees of any pension arrangement or insurance company with whom such an arrangement has been effected, any information necessary in connection with this pension scheme.
- IV. We agree the purpose of the Scheme in respect of which the plan is to provide relevant benefits as defined in Part 4 of the Finance Act 2004.

Any changes to the answers given before the plan comes into force must be notified to Aviva.

Authorised signatory

Signature

Name (please print)

Date

Day

Month

Year

Was financial advice given on the sale
of this pension to the member?

Yes No

Tick one

This question is to be completed by the
Trustee/employer only

| Retirement | Investments | Insurance | Health |

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