

# AVC Instruction Form

## D&B (UK) Pension Plan

DBAVCIF NE06001 09/2022

### Important notes

Please complete this application using BLOCK CAPITALS throughout and tick the boxes  where appropriate.

- Only complete this form when you have read the accompanying documentation.
- All sections of this form must be read and you must complete all applicable sections.
- Please complete this form if you wish to start making AVC contributions, vary your regular AVC contribution or pay a single contribution into your policy.
- Once completed, return this form to the **D&B UK People Team**.
- Please note that AVC payments are made through a salary sacrifice/exchange arrangement. You may opt out of this arrangement by contacting the D&B UK People Team.

### A Your details

Title	Mr <input type="checkbox"/>	Mrs <input type="checkbox"/>	Miss <input type="checkbox"/>	Ms <input type="checkbox"/>	Other <input type="text"/>
Surname	<input type="text"/>				
Forename(s)	<input type="text"/>				
Permanent residential address	<input type="text"/>				
	Town/City <input type="text"/>		County <input type="text"/>		
	Postcode <input type="text"/>				
Personal Email (non work)	<input type="text"/>				
Date of birth	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Nationality	<input type="text"/>				
National Insurance number	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
You can normally find your National Insurance number on your pay slip, tax return or tax code slip. Your National Insurance number should be in the format AB123456C. The final character should be A, B, C or D. Temporary numbers in the format TN999999 or 99Y999999 are not acceptable. If you do have a permanent National Insurance number, you must disclose it to Aviva to proceed with this application.					
Please indicate if you are already subject to the reduced money purchase annual allowance. Yes <input type="checkbox"/> No <input type="checkbox"/>					
If yes, please provide a copy of the statement you received from the provider of the arrangement(s) you accessed or provide the date you flexibly accessed these savings. <input type="text"/> <input type="text"/> <input type="text"/>					
The provider of the arrangement(s) you have flexibly accessed is required to provide a statement to you within 31 days of the date flexi-access occurred. Flexibly accessed generally means that you have taken money purchase benefits other than by purchasing an annuity from an insurance company.					
Name of scheme	D&B (UK) Pension Plan				
Membership number (if known)	<input type="text"/>				

## B Additional Voluntary Contributions

This instruction will commence from the next available payroll cycle.  
 This may occur in the calendar month following your completion of this form.

a) I wish to start Additional Voluntary Contributions to the D&B (UK) Pension Plan as follows:

A regular monthly contribution £  or  % of pensionable salary payable monthly  
**and/or**  
 Single contribution £

or

b) I wish to vary my Additional Voluntary Contributions to the D&B (UK) Pension Plan as follows:

A revised regular monthly contribution £  or  % of pensionable salary payable monthly  
**and/or**  
 Single contribution £   
 Effective date of change (if not the next available payroll cycle)

## C Your investment allocation

If you are a member of the D&B (UK) Pension Plan DC Section, your AVC contributions will be invested in the same funds as the DC Section. However, if you wish to amend your investment instructions for both AVC and Defined Contribution you may do this online at [www.aviva.co.uk/membersite](http://www.aviva.co.uk/membersite) or by sending revised instructions to D&B UK People Team.

Only complete section C if you are a member of the D&B (UK) Pension Plan CARE Section and do not already have an AVC account. Please indicate below your required investment instructions

Please indicate below how you would like to invest your contributions (please tick one box):

The Diversified Annuity Lifestyle 2021   
 or  
 The Diversified Drawdown Lifestyle 2021   
 or  
 The Equity Annuity Lifestyle 2021   
 or  
 The Equity Drawdown Lifestyle 2021

- A Lifestyle Investment Programme will take 100% of your contribution and cannot be combined with any other investment.

Alternatively you may Self Select your funds from the available choices below

- Please detail your choice of funds below using whole percentages only.
- Please ensure your allocation totals 100%.
- Please note a Lifestyle Investment Programme will take 100% of your contribution and cannot be combined with any other investment.

Investment fund name	Allocation (whole % only)
Aviva Pension BlackRock (30:70) Currency Hedged Global Equity Index Tracker IE	<input type="text"/> %
Aviva Pension BlackRock Over 15 Year Corporate Bond Index Tracker IE	<input type="text"/> %
Aviva Pension BlackRock Over 15 Year Gilt Index Tracker IE	<input type="text"/> %
Aviva Pension BlackRock Over 5 Year Index-Linked Gilt Index Tracker IE	<input type="text"/> %
Aviva Pension BlackRock UK Equity Index Tracker IE	<input type="text"/> %
Aviva Pension BlackRock World ex UK Equity Index Tracker IE	<input type="text"/> %
Aviva Pension Artemis UK Special Situations IE	<input type="text"/> %
Dun and Bradstreet (UK) Pension Plan Global Equity Active IE	<input type="text"/> %
Aviva Pension Money Market IE	<input type="text"/> %
Aviva Pension Legal & General (PMC) All Stocks Gilts Index IE	<input type="text"/> %
Aviva Pension LGIM Diversified XE	<input type="text"/> %
Aviva Pension CT Pensions Property IE	<input type="text"/> %
<b>Total 100%</b>	

## D Your nominee information

Please complete a separate Expression of Wishes form found on the Dun & Bradstreet Pension site <https://www.dnbpensionplan.co.uk>. This will give details of people you would like to nominate to receive any lump sums payable on your death. It is important that this information is kept up to date.

## E 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](https://www.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](mailto: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](mailto:dataprt@aviva.com).

### Contacting us

If you have any questions about how we use personal information, or if you want to exercise your rights stated above, please contact our Data Protection Officer by writing to them at Data Protection Officer, Aviva, Level 4, Pitheavlis, Perth, PH2 0NH.

If you have a complaint or concern about how we use your personal information, please contact us in the first instance and we will attempt to resolve the issue as soon as possible. You also have the right to lodge a complaint with the Information Commissioner’s Office at any time.

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

#### Financial crime

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

A record may be kept of any searches carried out and any suspicions of financial crime and related details may be retained and used to assist other companies for verification and identification purposes. The search is not a credit check and your credit rating should not be affected.

## F Member declaration

**It can be a serious offence to make false statements. This could lead to prosecution and the penalties are severe.**

- 1 I apply for membership of the D&B (UK) Pension Plan and agree to be bound by the rules of the scheme (only applicable if you are not already a member of the scheme).
- 2 I authorise my employer to deduct my voluntary contributions from my salary.
- 3 I declare that the statements provided in this application form and any associated documents including any that are not in my handwriting, are to the best of my knowledge and belief, correct and complete.
- 4 Please allocate my contributions as I have indicated on this form.
- 5 I understand that future contributions will be allocated as indicated until I send revised instructions to D&B UK People Team.
- 6 If I have chosen the Lifestyle Investment Programme for my policy, my investments will be switched according to the terms that have been agreed.
- 7 I understand that any nomination I have made in Section D will not bind the trustees but will assist them in paying the benefits as I would wish.
- 8 If I have flexibly accessed money purchase pensions savings, it is my responsibility to inform Aviva of the date this occurred and I understand that a reduced annual allowance applies.

**Note: If you are under the age of 18, this form must be signed by your Parent or Guardian.**

Signature

Print name

Date

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**Aviva Life & Pensions UK Limited.**

Registered in England No. 3253947. Registered office: Aviva, Wellington Row, York, YO90 1WR.

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**Telephone 0345 602 9221 - Calls to Aviva may be recorded.**

**www.aviva.co.uk**

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