



# INVESTMENT OPTIONS FORM

Please complete this form to select your investment options. It will replace any previous selections. Before making any investment decisions you may wish to seek independent financial advice.

## SECTION A: PERSONAL DETAILS

**PLEASE USE CAPITAL LETTERS**

Surname	Title
First name(s)	Membership Number

## SECTION B: TARGET RETIREMENT DATE

Please indicate the day, month and year which you plan to retire. This will be your target retirement date. Please note, this date does not need to be the same as your normal retirement date. You can change your target retirement date at any time on your online account.

Day:	Month:	Year:
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**Please let us know if you change your retirement plans. If you do not specify a target retirement date, we will use your state pension age instead.**

## SECTION C: INVESTMENT OPTIONS

You can either invest in the Lifeplan or make your own investment decisions. The Lifeplan allows the Trustee to manage your investment choices for you throughout your membership so you are invested in the investments that the Trustee considers right for you at different stages of your life.

If you choose to make your own investment decisions you can do so by selecting one or more of the Cheviot options. You can move your funds between options. It is your responsibility to review your investment choices and decide which option(s) is right for you at the different stages of your life.

Further details about Cheviot’s investment options are available on our website [www.mycheviotpension.com](http://www.mycheviotpension.com).

## SECTION D: YOUR INVESTMENT OPTIONS

If you do not choose an option, your contributions will be invested in the Lifeplan by the Trustee on your behalf. Please choose ONE of the following options:

### Option 1

I wish to join the Cheviot Lifeplan and authorise the Trustee to manage my investment choices for me.

### Option 2

I have received communication from the Trustee regarding the Lifeplan and confirm I wish to invest according to my own investment strategy as indicated below:

Cheviot Growth	Suitable for long term investment	%
Cheviot Moderate	Suitable for long term investment	%
Cheviot Low Cost	Suitable for long term investment	%
Cheviot Cautious	Suitable for medium term investment	%
Cheviot Retirement Planning	Suitable for medium term investment	%
Cheviot Annuity Planning	Short term investment only	%
Cheviot Cash	Short term investment only	%
Legal & General- Global Equity Index	Suitable for long term investment	%
Legal & General- UK Equity Index	Suitable for long term investment	%
Blackrock Aquila Connect Emerging Markets	Suitable for long term investment	%
HSBC- Islamic Global Equity Index	Suitable for long term investment	%
Legal & General- Ethical Global Equity Index	Suitable for long term investment	%
<b>Total</b>		<b>100%</b>

**You can select multiple funds. Please specify in whole percentages which must total 100%.**

Further information about each fund, including past performance and suitability is available on our website.

## SECTION E: DECLARATION

I confirm my investment choice above until further notice. I understand that past performance is not a reliable guide to the future as all funds can go down as well as up. I acknowledge that the information on this form is held and processed by The Cheviot Trust, my employer and organisations providing services for the purpose of administering the scheme, in accordance with the Data Protection Act 2018 and the General Data Protection Regulations which is available at <https://mycheviotpension.com/privacy-policy/>

Signature:	Date:
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**Please complete this form and return to the following address:**

**The Cheviot Trust, Kingswood House, 58 – 64 Baxter Avenue, Southend-on-Sea, Essex  
SS2 6BG**

**T. 01702 354024**

**E. [people@cheviottrust.com](mailto:people@cheviottrust.com)**

**W. [www.mycheviotpension.com](http://www.mycheviotpension.com)**