

BOC Retirement Savings Plan

Starting/changing contributions form



This form is for notifying BOC Pension Services that you would like to:

- restart contributions to the BOC Retirement Savings Plan (the RS Plan) if you have previously opted out; or
- change your rate of contributions to the RS Plan.



Please note that if you wish to make contributions above 5% of your Pensionable Salary, you will need to complete a *Starting/changing extra contributions form*.

Please complete all relevant sections, sign and date the form and return it to the address on the back page.

Section 1: Personal details (please use block capitals)

Surname:

Title (e.g. Mr, Mrs, Dr):

Forename(s):

Sex: Male

Female

(DD / MM / YYYY)

National Insurance number:

Date of birth:

/ /)

I am paid:

Weekly

Monthly

Email address:

Work location:

Daytime telephone number:

Are you subject to the Money Purchase Annual Allowance (MPAA)? (in other words, are you/have you already taken benefits from another pension scheme that triggers the MPAA?)

Yes

No

Section 2: Contribution instructions

This section is for selecting your rate of contributions to the RS Plan. **Please tick one box only in the table below.**

RS section

Your contributions	Company contributions	Total invested to your Account
5%	10.7%	15.7%
4%	8.7%	12.7%
3%	6.7%	9.7%

Do you want to pay extra contributions?

If you would like to pay extra contributions, before you complete this section you should consider whether you are already paying the maximum normal contributions.

If you participate in Salary Exchange, the Company will pay an additional 5% of any contributions you make.

Change of extra contributions forms are available from www.bocpensions.co.uk or on request from BOC Pension Services.



All forms can be found at www.bocpensions.co.uk or on request from BOC Pension Services.

Section 3: Investing your Account

Now that you've chosen your new normal contribution rate, you might want to also change how your Account is invested. If you want to change your investments, please complete a *Change of investment form*.

Change of investment forms are available from www.bocpensions.co.uk or on request from BOC Pension Services. If you do not complete a *Change of investment form*, we will invest your contributions in accordance with your existing instruction. If we do not hold an existing instruction, your contributions will be invested in the default BOC Lifestyle fund.

Section 4: Authorisation

I agree to:

- my Pensionable Salary being reduced by my chosen rate, as indicated in Section 2, if I participate in Salary Exchange; or
- the contributions indicated in Section 2 being deducted from my Pensionable Salary, if I have opted out of Salary Exchange.

I understand that if I am already taking benefits from another pension arrangement I must disclose this and may be subject to different tax allowances.

(DD / MM / YYYY)

Signed:

Date: / /

General Data Protection Regulation (GDPR)

I consent to my personal information (including any sensitive personal information) being held and processed by the Trustee, BOC Pension Services and any third party appointed for the effective running of the RS Plan. I understand that the Trustee and BOC Pension Services, and any third parties to whom they make the data available, will comply with the underlying principles of applicable data protection legislation, including the General Data Protection Regulation (EU) 2016/679.

If you want to know more about the data held which relates to you or the purposes for which it may be used, please refer to the data privacy statement provided separately to you, or alternatively please contact BOC Pension Services.

The Trustee may send you information about RS Plan to your work email address. If you leave employment, information may be sent to a different email address if you have provided one.

Legal note

The Trustee is not liable for any penalties arising as a result of any inaccurate information provided on this form, or any failure to provide relevant information.

Contact us

BOC Pension Services

The Priestley Centre, 10 Priestley Road, The Surrey Research Park,
Guildford, Surrey GU2 7XY, United Kingdom
Helpline 0800 096 3214, BOC Tel 750 4745, pensions.uk@boc.com



www.bocpensions.co.uk



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