**A F BLAKEMORE AND SON LIMITED STAFF RETIREMENT BENEFIT SCHEME**

**APPLICATION FORM**

**Return to HR Shared Services, A.F.Blakemore & Son Ltd,**

**Longacre Industrial Estate, Rosehill, Willenhall, West Midlands WV13 2JP**

|  |  |  |  |
| --- | --- | --- | --- |
| Surname |  | Forename |  |
| Employee No |  | Title | Mr / Mrs / Miss / Ms |
| Birth Date |  | Sex | Male / Female |
| Depot/Store |  | Department |  |
| NI Number |  | Marital Status |  |
| Address |  | | |

**Your Investment Choice – please complete either Option 1 or Option 2 below**

Please refer to Your Pension Scheme – Guidance Notes for further details. *If you do not indicate your choice, the Trustees will select the Lifestyle Strategy with a target retirement age of 65.*

***Option 1:- Please indicate if you would like to invest in the lifestyle strategy:***

If you select this option, please also select your chosen retirement age – **between 55 and 68**. If you do not make a selection, your selected retirement age will be 65. Please note that whatever age you choose now, you will be able to retire at a different age, if you so wish. The chosen retirement age only determines when the funds in your Account switch from the growth stage to the protection stage.

|  |  |  |  |
| --- | --- | --- | --- |
| **Default Lifestyle Strategy (*please circle either YES or No*)** | Yes / No | **Target Retirement Age:**  **(please choose an age between 55 and 68)** |  |

***Option 2:- As an alternative to the above, you can select the funds in which your contributions are invested. If you do wish to select your own funds, please indicate your choices below.***

|  |  |
| --- | --- |
| **Investment Funds available;** | **Percentage of**  **Contributions paid (Whole %)** |
| A Global Equity Fund (currently the Baillie Gifford Global Alpha Growth Fund B Accumulation) |  |
| A UK Equity Fund (currently the Baillie Gifford UK Equity Core Fund B Accumulation) |  |
| An Emerging Markets Equity Fund (currently the Baillie Gifford Emerging Markets Leading Companies Fund G Acc) |  |
| A Diversified Growth Fund (currently the Baillie Gifford Diversified Growth Fund B2 Accumulation) |  |
| A Managed Fund (currently the Baillie Gifford Managed Fund B Accumulation) |  |
| A Long Corporate Bond Fund (currently the Baillie Gifford Investment Grade Long Bond Fund B Accumulation) |  |
| A Long Gilt Fund (currently the Baillie Gifford Active Long Gilt Plus Fund B2 Accumulation) |  |
| An Index-linked Gilt Fund (currently the Baillie Gifford Active Index-Linked Gilt Plus Fund B Accumulation) |  |
| A Multi-Asset Growth Fund (currently the Baillie Gifford Multi-Asset Growth Fund B1 Accumulation) |  |
| **Total - your selection must total 100%** | **100%** |

**Your Contributions**

***Please indicate how much you would like to contribute. This can be any amount between 3% and 100% of Pensionable Earnings, in increments of ½%., eg 3%, 3.5%, 4%, 4.5% etc.***

|  |  |
| --- | --- |
| I would like to contribute the following percentage of Pensionable Earnings  (Your Employer shall match your contributions, up to a maximum of 5% of Pensionable Earnings). | % |

|  |  |
| --- | --- |
| Have you had or will you receive any benefits from other pension arrangements? **If yes, please provide full details** | Yes / No |
| Have you drawn any previous pension benefits or tax free cash sums? **If yes, please provide full details** | Yes / No |
| Are you registered for Primary, Enhanced, Fixed or Individual Protection?  **If so, do not join without talking to our administrators** (see booklet) | Yes / No |

# The Trustees of the Scheme are registered under the Data Protection Act 1998. By submitting this application to join the Scheme you consent to the Trustees (including any third party contractors they may use to carry out the services on their behalf) processing your personal information for the purpose of the administration of the Scheme. *I hereby apply for admission as a member of the Scheme. I authorise my employer to deduct from my earnings the contributions payable by me to the Scheme.*

# EMPLOYEE SIGNATURE: …………………………................................................................ Date: …………………

**------------------------------------------------------------------------------------------------------------------------------------------------------------------------------**

**FOR COMPLETION BY THE COMPANY (please use capital letters)**

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Date Joined Company: |  | Date Joined Scheme/Fund: |  | |
| Current Gross Salary: |  | Current Pensionable Salary: |  | |
| Category: \*delete as appropriate | Salaried | Non salaried |  | |
| Pension Contributions Rates  (minimum Employee Rate 3%): | Employee: % | Company: % | Investment choice checked |  |
| Date appears on first payroll file: |  | | | |
| Signed on behalf of the Company: |  | Print Name: |  | |
| Date: |  | **Pass a copy to Hughes Price Walker when completed** | | |