



INVESTMENT SWITCH INSTRUCTION FORM

PLEASE USE BLOCK CAPITALS

Company Name

Member Name

Member Address

Date of Birth

The investment instructions given on this form relate to the company named above only.

The Trustees recommend that members seek independent investment advice when considering their investment options.

Further information regarding your investment options are available at www.cers.ie/funds or from the Scheme Administration and should be read before completing this form.

You need to decide whether your new investment choices apply to:

- > Your existing funds only
(complete "Investment switch instruction for existing funds")
- > Your future contributions only
(complete "Investment switch instruction for future contributions")
- > BOTH your existing funds AND your future contributions
(complete both)

Investment instructions are not effective or accepted by CERS unless and until confirmation of receipt of those instructions has been issued by a member of the CERS Administration team. Members are advised to contact the Administration regarding any investment instruction which has not been acknowledged as neither the Trustees, the Scheme or the Administration accept responsibility for not processing instructions that for whatever reason have not been confirmed.

An investment instruction may be rejected by the CERS administration team for reasons including (but not limited to), the instruction form being unsigned, incomplete, or deemed un-executable.

MULTI ASSET FUND WITH LIFESTYLING - DEFAULT FUND (please tick)

Please note that partial Lifestyling is not an option, it will apply to all your funds in relation to this particular scheme and will replace any existing investment instruction in place. This option also applies to future contributions.

OR INVESTMENT SWITCH INSTRUCTION FOR EXISTING FUNDS:

Fund Name	Pension Account %	AVC Account %
Multi Asset Fund no Lifestyling		
Cash Fund		
Bond Fund		
Alternative Asset Fund		
Equity Fund		
Property Fund		
Total	100%	100%

***Total for account column must add to 100% or switch instruction form will be returned**

AND INVESTMENT SWITCH INSTRUCTION FOR FUTURE CONTRIBUTIONS:

Fund Name	Pension Account %	AVC Account %
Multi Asset Fund no Lifestyling		
Cash Fund		
Bond Fund		
Alternative Asset Fund		
Equity Fund		
Property Fund		
Total	100%	100%

***Total for account column must add to 100% or switch instruction form will be returned**

If your entire pension savings are not invested 100% in the Multi Asset Fund with lifestyling (default fund) seven years prior to your normal retirement age, you are deemed to have made your own investment choice and your fund will not be included for lifestyling.

The effective date of a switch instruction will be the date we acknowledge receipt of this form. Please note: Your switch instruction (existing funds and future contributions) will remain in place until we are advised otherwise. For further information regarding your investment options please visit our website www.cers.ie/funds or alternatively contact CERS administration on 01 407 1430.

Please complete the following:

I confirm that I have read and understood the investment options available to me (please tick)

Signature: _____

Date:

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When completed this form should be returned to CERS, Canal House, Canal Road, Dublin 6

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