

Menzies Money Purchase Pension Scheme

Member application form (* delete as applicable)



Surname _____	National Insurance number _____
Forenames in full _____	Sex male / female*
Title Mr / Mrs / Miss / Ms*	Marital status single / married / divorced / separated / living with partner / widow(er)*
Home Address _____ _____	Employing division of Menzies Distribution / MAG*
_____ Postcode _____	Work location _____
Date of Birth _____	Payroll Number _____

General Information

The Menzies Money Purchase Pension Scheme is not contracted-out of the State Second Pension. If you want to contract-out of the State Second Pension, you may do so using your own Appropriate Personal Pension. If considering this option, we recommend you seek independent financial advice.

You may pay Additional Voluntary Contributions (AVCs). These can be invested in the Menzies AVC arrangement. Alternatively, you may pay AVCs to your own Free Standing AVC arrangement. You may pay contributions up to 100% of your earnings.

If you require any further information please contact the Pensions Department on 0131 225 8555.

Investment

Option 1 – Lifestyle option (Trustee Default option)

yes no

Option 2 – Free choice

yes no

If you do not select the Lifestyle option, then please complete the table below to indicate how you wish the contributions to be invested. The selected options should add up to 100%.

Fund	Percentage
Legal & General Global Equity (60:40) Index Fund
Legal & General UK Equity Index Fund
Legal & General Over 5 Year Index Linked Index Fund
Legal & General Over 15 Year AAA Corporate Bond Fund
Legal & General Cash Fund



Additional Voluntary Contributions (AVCs)

Do you wish to pay AVCs to the Scheme? yes no
(You may do this even if you already have a Free-Standing AVC)

If yes, please complete the following information:
Please complete the appropriate box confirming your agreement to deduct AVCs at the rate shown:

£ per month

I wish my AVC payments to be invested as follows:

Option 1 – Lifestyle option yes no

Option 2 – Free choice yes no

If you do not select the Lifestyle option, then please complete the table below to indicate how you wish the AVCs to be invested. The selected options should add up to 100%.

Fund	Percentage
Legal & General Global Equity (60:40) Index Fund
Legal & General UK Equity Index Fund
Legal & General Over 5 Year Index Linked Index Fund
Legal & General Over 15 Year AAA Corporate Bond Fund
Legal & General Cash Fund

Free Standing AVC

Please confirm if you are currently paying into a
Free Standing AVC
 yes no

If yes, please provide details of the arrangement:

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Retained Benefits

Please confirm if you have any benefits that will be payable to you at retirement from a previous pension scheme
 yes no

Transfer Value

The scheme does not accept transfer payments from a previous pension arrangement.

Data Protection Act 1998

In accordance with the Data Protection Act 1998 you are advised that your personal data will be used to administer your occupational pension, and may be passed to professional advisers from time to time.

Upon your signing this form below you are hereby giving your consent to these uses of your personal data.

I Hereby apply for membership of the Scheme and agree to be bound by the rules. I authorise and request the Company to deduct from my salary or wage the amount necessary to pay my contribution as shown in accordance with the rules of the Scheme.

Member's signature Date

Declaration of unimpaired health

The following should be completed if you are joining the Scheme more than one year after you joined the Company.

I declare that, to the best of my knowledge and belief, I am currently in good health. I have not been absent from work through illness for more than one week during the past three months and I am not currently under treatment for any medical complaint.

Signed

If you cannot sign the above declaration you will be required to complete a medical questionnaire which will be sent to you by the Group Pensions Department. Failure to disclose relevant information could lead to your death benefits being reduced.

