Transferring your pension to the Fidelity Master Trust



Unilever Investing Plan

Fidelity reference:							
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Your Fidelity reference can be found on the Planviewer homepage or in the top right corner of a letter received from us.

You will also need to contact Capita to confirm to us how you want your benefits to be paid.

Please note we will not be able to complete this instruction until we receive Capita's confirmation that the transfer can proceed and how your benefits are to be paid.

and now your benefits are to be paid.
Once you have completed this form, you can send it to us at Fidelity Workplace Investing Service Centre, Beech Gate, Millfield Lane, Lower Kingswood, Tadworth, Surrey, KT20 6RP.
About You (you must complete this)
Title:
Mr Mrs Ms Other:
First name(s):
Surname:
Your contact details (in case we need to check anything)
Personal email address:
Phone number:
Declaration
By signing below, I declare that:
Lauthorise Fidelity to use my personal data and any other information relating to my Pension Sayings Account in the Unilever Investing Plan to

- I authorise Fidelity to use my personal data and any other information relating to my Pension Savings Account in the Unilever Investing Plan, to create an account in the Unilever Section Fidelity Master Trust and enable them to receive the balance as instructed by Capita, and understand that the transfer will be carried out in line with the rules of both plans.
- · I have read the accompanying documents about the Fidelity Master Trust, including Your Plan Explained and Investment Choices Guide.
- I understand that I will have the same investment(s) in the Unilever Section Fidelity Master Trust as I currently have in the Unilever Investing Plan.
- I am resident in the UK for tax purposes.
- I understand that transferring a pension is an irreversible decision, so I will not be able to move my money back to the Unilever Investing Plan.
- I understand there is no guarantee that transferring my pension savings to the Unilever Section Fidelity Master Trust will result in my receiving a higher retirement income.
- I accept that, on transfer of my pension savings from the Unilever Investing Plan, the administrator will be discharged from all claims and responsibilities in respect of my pension savings.
- · The information on this form is correct to the best of my knowledge and I will tell Fidelity immediately if any of it changes.
- I understand that if I have said I plan to retire at a different age from 65, my selected retirement age will be carried across to the Unilever Section
 Fidelity Master Trust. If I have already passed the age I selected, it will be adjusted to my next birthday.
- I confirm that I am not transferring any safeguard benefits.
- I understand that Fidelity will not process this instruction until they receive confirmation from Capita of how benefits are to be paid.

Your Signature	
	Date signed
	(DDMMYYYY)

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