

Extra contribution form

When to use this form

- Start paying extra contribution(s)
- Change how much you pay in extra contributions
- Stop paying extra contributions
- Change how your extra contributions are invested
(If you wish to change how your core contributions are invested, please complete a *Changing your investments* form)

Go to sections **1** **2** **5** **6**

Go to sections **1** **3** **5** **6**

Go to sections **1** **4** **6**

Go to sections **1** **5** **6**

Any changes affecting how much you pay as extra contributions will take place on the next available payroll run. Changes to how your extra contributions are invested will take place as soon as possible after ITV Pensions has received your completed form.

How to complete and return this form

Online

You can fill in this form online, save it to your computer and then email it to us at enquiries@itv-pensions.com.

Paper

You can print out a paper copy, complete it and then email a scanned (or photographed) copy to us at enquiries@itv-pensions.com or post a copy to *ITV Pensions, 5 Fulwood Park, Caxton Road, Fulwood, Preston PR2 9NZ.*

1 About you

Title	<input type="text"/>
Surname	<input type="text"/>
Forename(s)	<input type="text"/>
Phone number	<input type="text"/>
Email address	<input type="text"/>
NI number	<input type="text"/>
Date of birth	<input type="text"/> <i>Insert the date in the format DD/MM/YYYY</i>

2 Start paying

Please complete this section if you'd like to start paying extra contributions, as a monthly amount, as a one-off payment, or both.

Making regular payments

I wish to start paying extra contributions regularly of

£ a month *Insert a whole number in multiples of £1*

I would like my extra contributions to be deducted from my salary with effect from

Insert the date in the format DD/MM/YYYY

Making a one-off payment

I wish to make an extra contribution as a one-off lump sum payment of

£ *Insert the amount you wish to contribute*

I would like this one-off payment to be deducted from my salary with effect from

Insert the date in the format DD/MM/YYYY

If I also make regular extra contributions, I confirm that this one-off payment is in addition to those contributions.

I understand that my contributions will be deducted on the next available payroll run.

Now complete

5 and 6

3 Change your payment

Please complete this section if you'd like to change the amount of your extra contributions.

I wish to change the amount I pay in extra contributions to

£ a month *Insert a whole number in multiples of £1*

I'd like this change to take place from the first available payroll run after

Insert the date in the format DD/MM/YYYY

If you want to change how your extra contributions are invested, complete 5 and 6

or, if you want to invest your extra contributions in the same way as now, tick here and complete 6

4 Stop paying

Please complete this section if you'd like to stop paying regular extra contributions.

I wish to stop paying regular extra contributions as soon as possible after

Insert the date in the format DD/MM/YYYY

Now complete

6

5 Your investment choices

I'd like to invest my extra contributions:

- in the same way as my core contributions *tick here*
- differently to my core contributions as indicated below – please complete the table below by selecting **Guided** **or** **Customised** and then completing the information in the relevant column.

Guided
A 'pre-packaged' approach

OR

Customised
A 'pick your own' approach

Choose your Guided Growth phase

Focused

Diversified

Phased



Choose your Guided Synchronise phase

One-off cash

Multiple cash

Flexible access

Flexible access (longer term)*

Annuity

* You can't combine this option with the diversified growth phase



Choose your target retirement date

Insert a birthday from your 57th (55th until April 2028) to your 75th birthday

Your target retirement date triggers when your DC savings start to invest in less risky funds. Think of it as a countdown to accessing your savings – although you don't have to access your savings from this age and can change it at any time. If you're investing any other ITV DC savings through Guided, your existing target retirement date will take priority. To change your target retirement date, visit www.itvDCplan.com > Documents & Forms.

Choose the funds you want to invest in

With Customised, you can change how your existing extra DC savings are invested (complete column **A**), how your future extra contributions are invested (complete column **B**) or both (complete columns **A and B**).

Insert the percentage(s) in whole numbers you want to invest in each fund. Your total must add up to 100%.

	A Existing extra DC savings	B Future extra contributions
Annuity target	<input type="text"/>	<input type="text"/>
Diversified investments	<input type="text"/>	<input type="text"/>
Diversified investments (responsible investment)	<input type="text"/>	<input type="text"/>
Diversified investments (uncorrelated)	<input type="text"/>	<input type="text"/>
Emerging markets shares (index tracker)	<input type="text"/>	<input type="text"/>
Global shares	<input type="text"/>	<input type="text"/>
Global shares (climate) (index tracker)	<input type="text"/>	<input type="text"/>
Global shares (environment)	<input type="text"/>	<input type="text"/>
Global shares (index tracker)	<input type="text"/>	<input type="text"/>
Global shares (responsible investment) (index tracker)	<input type="text"/>	<input type="text"/>
Money markets	<input type="text"/>	<input type="text"/>
Shariah law	<input type="text"/>	<input type="text"/>
UK company bonds	<input type="text"/>	<input type="text"/>
UK government bonds (index tracker)	<input type="text"/>	<input type="text"/>
UK shares	<input type="text"/>	<input type="text"/>
UK shares (index tracker)	<input type="text"/>	<input type="text"/>
TOTAL	100%	100%

Make sure you've read and signed your agreement on the reverse

I authorise ITV to carry out my instructions as set out in this form and understand that my instructions will take effect from the next available pay run or my chosen month if later.

- I confirm that I understand how salary sacrifice works and that I'll make extra contributions automatically through salary sacrifice unless I request and return a *Salary sacrifice withdrawal* form within a month of requesting to make an extra contribution.
- If I make the extra contribution through salary sacrifice I give up my entitlement, with effect from the date of my application, to the monthly basic salary equal to my extra contribution. In return, my employer agrees to pay an extra contribution to the ITV DC Plan, for my benefit, of that amount. If I've decided not to participate through salary sacrifice by returning a *Salary sacrifice withdrawal* form, I authorise ITV to deduct the necessary contributions from my salary.
- I confirm that I've read the information in *Get the full picture: Your guide to the DC Plan and Deep dive into investments: DC Plan investment guide*.
- I understand that under the ITV DC Plan Rules, the total contributions paid into the ITV DC Plan each tax year are limited to the Annual Allowance, which is an HMRC limit on the amount of savings I can build up tax efficiently in any tax year. As I'm not able to contribute to the ITV DC Plan above my Annual Allowance without ITV's consent, I understand that I may not be able to contribute as much as I've chosen to contribute on this form if it results in me exceeding my Annual Allowance. ITV Pensions will contact me if this is the case.
- I confirm that if I take any retirement savings as cash (other than the 25% tax-free cash) or through flexible drawdown, I'll have a reduced Annual Allowance of £10,000 each tax year (known as the Money Purchase Annual Allowance) for future contributions paid to defined contribution arrangements. If I access benefits in this way I'll let ITV know within 91 days of accessing my benefits that the Money Purchase Annual Allowance applies.

I understand the Trustees of the ITV DC Plan hold personal data which I've provided to them. They need this to be able to administer my benefits under the DC Plan. The Trustees, who are data controllers for data protection purposes, are required to look after my personal data in line with legal requirements. This means the Trustees are responsible for deciding what personal information needs to be processed and the way in which the information is processed. In processing my personal data, the Trustees may need to pass personal information about me, my dependants and other members and beneficiaries to the DC Plans' administrators, auditors, legal advisers, insurers or other occupational pension schemes and their advisers with a view to securing benefits or making or receiving a transfer of benefits, and the ITV group of companies and such third parties as may be necessary for the purpose of administering DC Plan.

Where to find out more: Full details of the personal data the Trustees hold, how they use that information and who they share it with are set out in the Trustees' privacy notice. The privacy notice also sets out your rights about the personal data held about you by the Trustees and who to contact if you want to exercise those rights, make a complaint or generally have any questions.

The privacy notice is updated from time to time in accordance with future developments in data protection legislation and DC Plan practice. You can see the current version of the privacy notice at www.itvdcplan.com/privacy-notice. If you'd prefer to receive a hard copy of the privacy notice, please call ITV Pensions on 01772 884 488 or email enquiries@itv-pensions.com.

You're responsible for keeping the Trustees up-to-date with your personal information, including your marital status, contact and, where necessary, bank details. Without this information, there may be delays in paying benefits to you or your dependants.

Signed:*

Date:

** If you're completing this form online, please fill in your full name here.*

For office use only (to be completed by ITV Pensions)

I confirm that all of the details above have been checked and verified.

Signed:

Date:

Name:

Contact number: