

# AA Worksave Pension Plan Application Form - Legal & General

TO BE COMPLETED IN BLOCK CAPITALS.

## PERSONAL DETAILS

Surname		First name	
Payroll number	National Insurance number	Date of birth	

## CONTRIBUTION RATES

Please indicate your chosen contribution rate (in each case subject to AA WPP Plus – see below).

I wish to pay an Employee Contribution of 4% and benefit from an Employer Contribution of 6%

OR

I wish to pay an Employee Contribution of 5% and benefit from an Employer Contribution of 7%

OR

I wish to pay more than 5% and benefit from an Employer Contribution of 7%  %  
 Please indicate your chosen contribution rate in the box

## AMENDMENT TO CONTRACT

Notwithstanding any other provisions of my terms and conditions of employment, I agree to the following:

- The Company shall reduce my contractual gross salary and any other relevant earnings by a sum equivalent to the contribution that I would otherwise make under the pension plan. This will be shown as '**AA WPP Plus Pension**' on my payslip and be known as the '**AA WPP Plus adjustment**', and
- The Company shall pay a value equivalent to the **AA WPP Plus adjustment** into my pension fund as employer contributions. These will be paid in addition to normal employer contributions.

This arrangement will continue until either:

- A lifestyle change occurs (as defined in the scheme booklet) and I instruct the company that I wish to cease the **AA WPP Plus** arrangement. This must be done within one month of the lifestyle change occurring.
- If a lifestyle change occurs and the Company is required to automatically cease operating the **AA WPP Plus** arrangement to prevent the **AA WPP Plus adjustment** being applied to a statutory payment. In such cases, I will automatically be put back in to **AA WPP Plus** when the lifestyle change ceases to apply.
- I cease to be a member of the pension plan.

- There are any government or legal changes that are relevant, in which case the Company may withdraw this arrangement.
- The application of **AA WPP Plus** would reduce my earnings below the National Insurance Lower Earning Limit.
- The application of **AA WPP Plus** would reduce my earnings to below the National Minimum Wage or the National Living Wage (as applicable).

In the event that such change occurs, the Company reserves the right to:

- Increase my contractual gross salary/wage by a sum equivalent to the **AA WPP Plus adjustment**, and
- Deduct any relevant employee pension contributions from my salary and pay this into the pension plan.

In the event that I choose to leave **AA WPP Plus** as described above, I authorise the Company to make a deduction from my salary at source of the appropriate percentage specified above (or any subsequent change to that amount that I have requested), representing my employee contributions towards the Scheme. This deduction is to be made on a weekly (if I am weekly paid) or monthly basis with effect from the next possible payroll date until I notify the Company in writing otherwise.

## MEMBER DECLARATION

- I understand that I am entering into a long-term pension arrangement and I can only cease my active membership upon giving at least one month's notice in writing to cease membership or by my employment with the Company ceasing.
- By completing this form, I am consenting to the processing of any personal data held about me by the AA as data controllers or its data processors, in accordance with the provisions of the General Data Protection Regulation ("GDPR"). The AA and Legal & General will be Data Controllers under GDPR. I confirm that I have read the privacy policy statement available at [www.legalandgeneral.com/privacy-policy](http://www.legalandgeneral.com/privacy-policy) and consent to my data being used in the way described.
- I confirm I have had on-line access to the AA Pensions website. It details the basis of the Plan and contributions, along with Legal and General's supporting literature explaining the Contract details.
- I understand that my contributions will be invested in the Global Fixed Weights 50/50 Index Pre-Retirement 10 Year lifestyle Profile (L&G code LLNY) unless or until I advise Legal & General otherwise. I understand I should regularly review whether my investment choice remains the appropriate for my needs.
- I understand that a Salary Cap applies to any reference to where the term 'salary' is used above. The Salary Cap for 2018/2019 tax year is £150,600. This figure is reviewed annually.
- I understand that my default retirement age will be 65 until and unless I advise Legal & General otherwise.

Signature

Date