

# Adding a bit extra

## Extra contribution form



Use this form if you would like to:

- 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)

Complete sections **1 2** ○ ○ **5 6**

Complete sections **1** ○ **3** ○ ○ **6**

Complete sections **1** ○ ○ **4** ○ **6**

Complete 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.

Please complete in BLOCK capitals and return to;

ITV Pensions, 5 Fulwood Park, Caxton Road, Fulwood, Preston PR2 9NZ

### 1 About you

Title

Surname

Forename(s)

Home address

Postcode

NI number

Date of birth  -  -

## 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/YY*

### 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/YY*

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/YY*

Now 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/YY*

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 **hands off** **or** **hands on** and then completing the information in the relevant column.

**Hands off**  
A 'pre-packaged' approach

OR

**Hands on**  
A 'pick your own' approach

### Choose your *hands off* Growth phase

Focused

Phased

Steady



### Choose your *hands off* Transition phase

Flexible Access

Flexible Access (continued growth)\*

One-off Cash

Multiple Cash

Pension

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



### Choose your *hands off* completion date

Insert a birthday from your  
**55th to your 75th birthday**

This is the date when the hands off approach is due to complete and is for investment purposes only. If you're investing any other ITV DC savings through hands off, your existing hands off completion date will take priority. To change your hands off completion date, visit [www.itvDCplan.com](http://www.itvDCplan.com) > Library > Forms.

### Choose the funds you want to invest in

With *hands on*, 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<br>Existing<br>extra<br>DC savings | B<br>Future<br>extra<br>contributions |
|-------------------------------------|--------------------------------------|---------------------------------------|
| Company bonds                       | <input type="text"/>                 | <input type="text"/>                  |
| Emerging markets (index tracker)    | <input type="text"/>                 | <input type="text"/>                  |
| Global shares                       | <input type="text"/>                 | <input type="text"/>                  |
| Global shares (index tracker)       | <input type="text"/>                 | <input type="text"/>                  |
| Mixed selection                     | <input type="text"/>                 | <input type="text"/>                  |
| Money markets                       | <input type="text"/>                 | <input type="text"/>                  |
| Pre-retirement                      | <input type="text"/>                 | <input type="text"/>                  |
| Property and infrastructure         | <input type="text"/>                 | <input type="text"/>                  |
| Shariah law (index tracker)         | <input type="text"/>                 | <input type="text"/>                  |
| Social conscience                   | <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"/>                  |
| <b>TOTAL</b>                        | <b>100%</b>                          | <b>100%</b>                           |

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

## 6

## Your agreement

I authorise ITV to carry out my instructions as set out in this form and understand that my instructions will take effect as soon as possible after ITV Pensions has received my completed form.

- 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 *Benefiting you: A guide to the ITV Defined Contribution Plan and We'll help you decide: Investing your ITV DC Savings*.
- 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 £4,000 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 that the Trustees hold personal data which I've provided to them. They need this to be able to administer my benefit under the ITV DC Plan. The Trustees, who are the data controller 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 that 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 ITV DC Plan's administrators, auditors, legal advisers, insurers, the ITV group of companies and such third parties as may be necessary for the purposes of administering the ITV 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, which is on the ITV DC Plan website at [www.itvDCplan.com](http://www.itvDCplan.com) > Library. 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 scheme practice and you can see the current version in the Library section of the ITV DC Plan website. Alternatively, if you'd prefer to receive a hard copy of the privacy notice, please contact ITV Pensions on 01772 884 488 or email [enquiries@itv-pensions.com](mailto: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

/ /

### 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: