

University of York Pension Fund

Additional Voluntary Contributions (AVC) lump sum payment form

To be completed by a member who is already contributing to an AVC with the University of York Pension Fund (the Fund) and wishes to pay a single lump sum amount in addition to their regular contributions.

I authorise my employer and the University of York Pension Fund to deduct a lump sum in line with my instructions below and to pass any information about me, which might reasonably be required to make this lump sum payment to my existing arrangement under the Fund, to AEGON UK Plc.

I wish to make the following single lump sum contribution to an AVC:

A fixed amount of

£

I understand that the AVC contribution amount will be deducted from my gross pay and authorise my employer to make this deduction from my pay. I understand that this amount will be deducted from the next available payroll run.

I understand that the investment of this lump sum will be made in line with my existing investment choices and that I am able to change where my funds are invested by logging into my online account and making the amendments to my policy.

I understand that saving large amounts into an AVC can have tax implications if it causes me to breach the annual allowance, the money purchase annual allowance (if I am subject to this) or the lifetime allowance and it is my responsibility to investigate these and satisfy myself that I am aware of the impact and consequences of this. I understand that the Trustee recommends that I take financial advice.

Signed

Date

Print name

National insurance number

What to do next

- Return this to The Pensions Team, The University of York, Heslington Hall, York, YO10 5DD