

Parker Hannifin Pension & Death Benefit Plan (the Plan)

Parker Hannifin recognises the need for flexibility in relation to unforeseen changes in your circumstances. Therefore, we have outlined a list of circumstances known as 'Lifestyle Events' where you will have the opportunity to change (with the consent of Parker) your participation in SMARTpension.

These lifestyle Events are as follows:

<ul style="list-style-type: none"> • Marriage or civil partnership • Birth or adoption of a child • Notification of pregnancy or commencement of/return from maternity leave • Divorce/legal separation/dissolution of civil partnership • Death of a partner or dependant 	<ul style="list-style-type: none"> • Commencement of or return from long-term sick leave • A partner's redundancy or involuntary loss of job • Commencement of or return from unpaid leave of greater than three months (adoption, paternity, sabbatical, career break etc.) 	<ul style="list-style-type: none"> • A significant change in hours (20% or more) • Commencement of or return from an overseas secondment • Leaving the company • Moving house
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On experiencing one of the Lifestyle Events you can choose to opt in or out of SMARTpension by completing this form. If you decided to opt in or out of SMARTpension upon experiencing a Lifestyle Event, you will then have the opportunity to review your decision with effect from 1 January and 1 July each year.

The decision to opt into or out of SMARTpension is yours alone, but you should give careful consideration before doing this and you may wish to consult an Independent Financial Adviser (IFA). To find an IFA local to you, visit www.unbiased.co.uk.

Please tick ONE of the options below:

I want to **opt in** to SMARTpension due to the Lifestyle Event listed below.

☐

I want to **opt out** of SMARTpension due to the Lifestyle Event listed below.

☐

Lifestyle Event:

Please continue overleaf



I fully understand the process and implications of my decision as detailed above and confirm my decision to opt in/opt out (delete one) of SMARTpensions.

Please complete the following details:

Title/Surname (Dr/Mr/Mrs etc):			
Forename(s):			
Payroll no.		NI no.	
Signature:		Date:	

Please note: In order to administer the Plan, the Trustee needs to hold and process information about you and this information may be passed to the Plan's professional advisers and administrators. The information may also be passed to the participating employers in the Plan. At all times personal information will be held and processed in accordance with the Data Protection Act 2018 and, effective from 25 May 2018, the European General Data Protection Regulation.

If you have any questions about how we hold and process information please refer to your copy of the Plan's privacy notice (a copy of which is available at www.parkerpensionplan.com or from Janet Ward.)

Tel: 0191 402 9046 **Email:** janet.ward@parker.com

Send this form to:

Parker Hannifin Manufacturing Ltd, Pensions Department, Dukesway, Team Valley Trading Estate, Gateshead, Tyne & Wear, NE11 0PZ

Tel: 0191 402 9046 **Email:** janet.ward@parker.com