SMARTpensions

Lifestyle event form



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:

•	Marriage or civil partnership	•	Commencement of or return	•	A significant change in hours
•	Birth or adoption of a child		from long-term sick leave		(20% or more)
•	Notification of pregnancy or	•	A partner's redundancy or	•	Commencement of or return
	commencement of/return		involuntary loss of job		from an overseas secondment
	from maternity leave	•	Commencement of or return	•	Leaving the company
•	Divorce/legal		from unpaid leave of greater	•	Moving house
	separation/dissolution of civil		than three months (adoption,		
	partnership		paternity, sabbatical, career		
•	Death of a partner or		break etc.)		
	dependant				

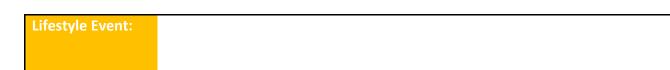
On experiencing one of the Lifestyle Events you can choose to opt in or out of SMARTpension by completing this form. If you decided to opt in or out of SMARTpension upon experiencing a Lifestyle Event, you will then have the opportunity to review your decision with effect from 1 January and 1 July each 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 <u>www.unbiased.co.uk</u>.

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.



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 <u>www.parkerpensionplan.com</u> 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