

# SEI Master Trust Application Form

To be completed by the prospective member. Once completed please return this form to your Vertiv Pension Contact.

## Part A

### Personal details

Surname		Forenames (in full)	
Date of birth		NI number	
Email address			
Home address			

## Part B

### Your contribution rate

Please indicate the level of contributions you wish to pay. This will be dependent on the section you are entering and you should refer to your Pension Contact for details.

Employee rate		%	Employer rate		%
AVC*		%			

\*An Additional Voluntary Contribution (AVC) is any regular employee contribution above the employee rate required to receive the maximum employer matched rate.

## Part C

### Investment options

By signing the declaration, you agree that your funds will be invested in the Default Lifestyle Strategy (Drawdown Higher Equity Lifestyle Strategy). Once you have joined the Scheme you will be able to submit a switch of investments via your SEI member account should you wish to change how your funds are invested. Further details can be found here:  
[www.seimastertrust.co.uk/library/documents](http://www.seimastertrust.co.uk/library/documents)

## Part D

### Member declaration

I understand that the above information will be used for operating the pension plan in my interests, and as such it may be available to third parties authorised by the Trustees of the SEI Master Trust.

Member signature		Date	
------------------	--	------	--

The information provided will be processed by the Scheme for purposes only associated with the Scheme and will be used in accordance with its policies and the Trust Deed & Rules and the applicable data protection legislation.