



# Extra voluntary contributions form

DC Investing Plan/Retirement Savings Plan



**Please complete and return the form on the next page if you want to start or change extra voluntary contributions into the DC Plan.**

**You can also use this form to make a one-off variable extra voluntary contribution from your redundancy lump sum into the DC Plan.**

**Note:** References in this form to the DC Plan mean the DC Investing Plan or Retirement Savings Plan as relevant to you.

Please return this form via email to the Expert Pensions Team at:  
**ExpertPensions.Team@unilever.com**

Full name: \_\_\_\_\_

Date of birth: \_\_\_\_\_ Employee ID number: \_\_\_\_\_

## Important:

**Before starting or increasing extra voluntary contributions you should make sure you are aware of the pensions tax allowances – to find out more go to:  
[www.unileverpensionhub.co.uk/pension-payments/tax](http://www.unileverpensionhub.co.uk/pension-payments/tax)**

You normally cannot stop paying or reduce fixed-term extra voluntary contributions between Annual Renewal dates, which occur on 1 October each year. There is some flexibility if you need to reduce or stop them because of annual allowance issues. If you think you may be affected, please email the Expert Pensions Team at [ExpertPensions.Team@unilever.com](mailto:ExpertPensions.Team@unilever.com).



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## 1. Regular contributions

a) Please fill in the contribution you would like to make as a percentage below:

Amount \_\_\_\_\_ %

b) Please tick one of the boxes below to tell us if you want to make fixed-term or variable extra voluntary contributions.

**Fixed-term**  Your contribution will be taken using salary sacrifice, which saves you and the company National Insurance. You can start or increase the amount you save as fixed-term extra voluntary contributions at any time. You can only decrease or stop the amount you save during the next Annual Renewal window. If you are already making fixed-term contributions this change will replace your current choice. If you are making variable contributions these will not change.

**Variable**  Your contribution will not be taken using salary sacrifice. You'll save on Income Tax but not National Insurance. You can start, stop, increase, or decrease the amount you save as variable extra voluntary contributions at any time. If you are already making variable contributions this change will replace your current choice. If you are making fixed-term contributions these will not change.

## 2. One-off contribution

You can make a one-off contribution as well as, or instead of, regular voluntary contributions. Please fill in the one-off amount you would like to make here:

£ \_\_\_\_\_

**Complete only if making a one-off contribution into the DC Plan from a redundancy lump sum:**

I would like the one-off contribution to be deducted from my pay in (enter month): \_\_\_\_\_  
(This should be the month in which your redundancy lump sum is paid to you.)

I confirm that my redundancy lump sum paid in that month will be greater than the one-off contribution amount. (Please tick.)

## Declaration

Please read the statements on this page and then sign below to confirm you understand and agree to what they say.

**Signed:** \_\_\_\_\_ **Date:** \_\_\_\_\_

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### To: the Trustees, my employer and Unilever PLC

**I understand** that:

- Under the current rules, my next chance to reduce or stop fixed-term extra voluntary contributions will be during the next Annual Renewal (the pension and benefit choices window that normally runs each summer) and my choices will take effect from the following 1 October.
- If I leave pensionable service, no contributions will be paid after my pensionable service ends.
- It is my responsibility to check whether making additional pension savings will take me over the annual allowance set by the Government, and that if my pension savings do exceed the annual allowance in a tax year that I must report this to HM Revenue & Customs (HMRC) and pay the tax charge. I am aware there is more information about this on: [unileverpensionhub.co.uk/pension-payments/tax](https://unileverpensionhub.co.uk/pension-payments/tax)
- It is my responsibility to check any other tax implications of making pension savings.
- It is my responsibility to decide how my extra voluntary contributions are invested. I understand that I can choose my own investments or leave the choice to the Trustees. I understand that these extra contributions will automatically go into the 'default' fund in the DC Plan chosen by the Trustees unless I have previously given instructions about how contributions should be invested and that instruction applies to this contribution.
- I am able to make changes to my investment choices online using Fidelity's PlanViewer or by phone to the Fidelity Pension Service Centre.
- The information provided does not cover all of the issues that may be relevant to my personal circumstances.
- My employer, other Unilever group companies, the Trustees and those involved in running the plans hold personal information about me (which may include sensitive personal data). Further information about the Trustees' data protection policy can be found on [www.unileverpensionhub.co.uk](https://www.unileverpensionhub.co.uk) at the 'Privacy Notice' link at the bottom of the page.
- All rights to benefits and contributions are given to me only as described in the Trust Deed and Rules of the Unilever UK Pension Fund from time to time in force and that I can request a copy of the Trust Deed and Rules from the Expert Pensions Team at [ExpertPensions.Team@unilever.com](mailto:ExpertPensions.Team@unilever.com). I agree to indemnify the Trustees, my employer and Unilever PLC against any liability of loss (including cost and expenses) which any of them may incur as a result of any breach by me of these terms and conditions. I am aware that I may ask Fidelity for details of these terms and conditions.

## To: the Trustees, my employer and Unilever PLC

### I agree that:

- If I have chosen to pay fixed-term extra voluntary contributions, my salary will be reduced by an amount equal to my chosen fixed-term contributions (for so long as my salary can, by law, be reduced by that amount). If I have chosen to pay fixed-term extra voluntary contributions but (at any time) my salary cannot, by law, be reduced by that amount, these contributions will, instead, be deducted from my pay, and treated as variable contributions instead.
- I will comply with the terms and conditions from time to time in force, under which Fidelity Investments Life Insurance Limited ('Fidelity') provides facilities in relation to my DC Plan account (including internet and telephone access). I agree to indemnify the Trustees, my employer and Unilever PLC against any liability of loss (including cost and expenses) which any of them may incur as a result of any breach by me of these terms and conditions. I am aware that I may ask Fidelity for details of these terms and conditions.

### I confirm that:

- I have read and understood the information the Trustees have given me about my choices, and the DC Plan.
- No one involved at my employer or any other Unilever group company (or anyone acting on behalf of any Unilever group company or the Trustees) has offered me individual financial advice.