



Changes to investment option in Personal pension savings

The undersigned

Name	Id. No.
Address	Location and postal code
Tel. no.	E-mail

Type of Personal pension

Personal pension (B-division)

Specified personal pension (C-division)

Inherited pension

Requests that

Future pension contributions be assigned to the investment option indicated below while the already accumulated balance be left unaltered.

The accumulated balance be transferred and future contributions assigned to the investment option indicated below.

The accumulated balance be transferred and future contributions assigned to the investment option indicated below.

Other

Please note

You must check the relevant box below in order to change your investment option.

Ævileið i – Long-term option:

The objective is to have the portfolio deliver a good long-term return with effective diversification of assets. Intended for investing a portfolio for longer than 7 years.

Ævileið ii – Cautious option:

The objective is to have the portfolio deliver a steady long-term return with limited risk. Intended for investing a portfolio for longer than 5 years.

Ævileið iii – Withdrawal option:

The objective is to preserve the accumulated assets while delivering a positive real return.

Ævilína – Automatic age-referenced transfer between investment options:

Transfer contributions and balance from Ævileið 1 to Ævileið 2 at age 55 years and from Ævileið 2 to Ævileið 3 upon withdrawal.

If an application is made before the 20th of each month, the balance transfer will take place on the last working day of that month. If an application is received after the 20th of each month, the transfer will take place on the last working day of the following month.

Undersigned

Location and date

Rightholder's signature

Information on the Fund's use of the applicant's personal data is available here.



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