

# Opt-Out Form

## Mercer Master Trust – IMI Retirement Savings Plan



This form is only available for active members of the Mercer Master Trust – IMI Retirement Savings Plan ("the Plan") who are unable to access IMI Optimize and wish to opt-out of making future contributions.

Active members of the Plan should make changes to their pension contributions through their IMI Optimize account [imi-optimize.co.uk](http://imi-optimize.co.uk) whenever possible. Please note, changes made through Optimize are effective in the following month's payroll.

This form cannot be used to opt-out when being auto-enrolled into the Mercer Master Trust – IMI Retirement Savings Plan. Auto-enrollment opt-outs must be actioned within the one month opt-out window direct with the Plan administrator, Scottish Widows.

Please complete this form in **BLOCK CAPITALS** and return it to your local HR contact for them to inform payroll.

### Personal Details

Full Name:			
Date of Birth:		National Insurance Number:	
Name of Employing Company:			

### Member's Statement:

I no longer want to be a member of the Plan. I understand that by opting-out of the Plan in this way:

- I will not build up any benefits in the Plan from the date I opt-out.
- Any Death in Service lump sum payable on my death will continue at 5 x Basic Pay.
- IMI will not contribute to any other pension arrangement on my behalf.
- Every three years, IMI are required to assess any employees who have left the Plan and re-enrol them if they are eligible.
- I can re-join the plan at any time.

Your Signature:		Date:	
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