

## INVESTMENT INSTRUCTION FORM

PLEASE USE BLOCK CAPITALS

Member Name:

Member Address:

Date of Birth:  Member ID:

Phone Number:

Email address:

The investment instructions given on this form relate to the Company and Member ID noted above only.

Further information regarding your investment options is available on our website or from the Scheme administration team and should be read before completing this form.

You need to decide whether your new investment choices apply to:

> **Your existing funds only**

(Complete "Investment switch instruction for existing funds" form).

> **Your future contributions only**

(Complete "Investment switch instruction for future contributions" form).

> **BOTH your existing funds AND your future contributions**

(Complete both)

Investment instructions are not effective or accepted by CIRT unless and until confirmation of receipt of those instructions has been issued by a member of the CIRT administration team. Members are advised to contact the administration team regarding any investment instruction which has not been acknowledged as neither the Trustee, the Scheme or the administration team accept responsibility for not processing instructions that for whatever reason have not been confirmed.

An investment instruction may be rejected by the CIRT administration team for reasons including (but not limited to), the instruction form being unsigned, incomplete, or deemed un-executable.

## OPTIONS

### INVESTMENT INSTRUCTION FOR EXISTING FUNDS:

I would like to invest my funds in the CIRT Lifestyle Strategy effective 1 June 2025 ☐ Yes ☐ No

Please note that partial Lifestyling is not an option. Lifestyling will apply to all your funds in relation to the Member ID outlined above and will replace any existing investment instruction in place. This option also applies to future contributions.

If you choose the CIRT Lifestyle Strategy and you are within the Lifestyling cycle on the date we receive the completed form, your funds will be transferred to the relevant fund(s) on the next quarterly investment date.

Fund Name	Pension Account %
Multi Asset Fund	
Cash Fund	
Bond Fund	
Alternative Asset Fund	
Equity Fund	
Property Fund	
<b>Total</b>	<b>100%</b>

**\*Total for account column must add to 100% or instruction form will be returned**

**AND**

### INVESTMENT INSTRUCTION FOR FUTURE CONTRIBUTIONS:

I would like to invest my funds as follows:

Fund Name	Pension Account %
Multi Asset Fund	
Cash Fund	
Bond Fund	
Alternative Asset Fund	
Equity Fund	
Property Fund	
<b>Total</b>	<b>100%</b>

**\*Total for account column must add to 100% or instruction form will be returned**

If your entire pension savings are not invested 100% in the CIRT Lifestyle Strategy seven years prior to your normal retirement age, you are deemed to have made your own investment choice and your fund will not be included for Lifestyling.

The effective date for investment instructions will be the date we acknowledge receipt of this form.

Please note: Your investment instruction (existing funds and future contributions) will remain in place until we are advised otherwise. For further information regarding your investment options please visit our website [www.cirt.ie](http://www.cirt.ie) or alternatively contact CIRT Administration on **01 407 1430** or [info@cirt.ie](mailto:info@cirt.ie)

Please complete the following:

I confirm that I have read and understood the investment options available to me: ☐ (please tick)

Signature: \_\_\_\_\_

Date:

Please return completed forms to: Construction Industry Retirement Trust (CIRT), Linden House, 4 Clonskeagh Square, Clonskeagh Road, Dublin 14, D14 FH90 | t: (01) 407 1430 | e: [info@cirt.ie](mailto:info@cirt.ie) | w: [www.cirt.ie](http://www.cirt.ie)