

Information about changes to your investments – Amber section of the Options Pension Trust

Alongside this communication, we have provided information about the transfer of your existing pension savings into new investments with Smart Pension later this year.

Ahead of the transfer to Smart Pension, Aegon are enhancing their LifePath fund range, this is where your investments are currently held. These adjustments will take place between June and September 2025, so this won't affect the planned move to Smart Pension later this year.

You do not need to take any action, and this notice is for information only.

The main changes are as follows:

1. The mix of investments as you approach retirement moves into typically lower risk investments. Following the enhancements to the LifePath fund range this change to the mix of investments will start 15 years before retirement age.
2. There will be a future focus on investments being subject to Aegon's climate commitments.

Further details can be found [here](#).

Date June 2025.