

Connect

For members with a Retirement Account and Investment Account

January 2023



What's inside?

- Your voice – we want to connect with you
- Connect to your Investment Account
- Connect to your retirement options
- Add your contact preferences to My AZ Pension
- Connect when you need help



Hello again!

We look after the pensions of over 20,000 people. The Trustee wants to continue to connect with you and to put your needs first when we talk to you about your pension. To make sure we focus on the things that will make the biggest difference to you, please do complete the enclosed 'Your voice' survey or go online and share your views. See pages 4 and 5 for more on this.

The last Connect launched the new **My AZ Pension** website and asked you to add your mailing preferences and death benefit nominations. We're pleased to say almost 7,000 members logged on to My AZ Pension since we sent you the last Connect. Our aim is to help as many members as we can to connect online, it's greener and quicker than paper. See pages 10 and 11 for more about how to log on to My AZ Pension and update your mailing and eDocument preferences.

2022 saw worrying news including Russia's invasion of Ukraine and the cost-of-living crisis affecting the economic environment. The Trustee has continued to manage the Fund finances with security of your benefits in mind.

We'd like to continue the 'conversation' we started in April, so please do complete our survey and go online to My AZ Pension if you haven't done so before. We look forward to hearing from you!

Adrian Kemp
Chair of Trustee

Your voice survey is now open



DO: please 'check-in' with us

You are one of the 10,000 members of the Fund who have not yet taken your benefits. We'd like to understand how you'd like to connect with the Fund, and what we can do to make it easier for you to manage your pension savings...

What we want to know:

We'd like to hear your voice on the Fund and how you interact with it, including:

- How useful you find Fund communications.
- How you'd like to be communicated with about the Fund.
- How well you feel you understand the Fund and your options for taking your Fund benefits in retirement.

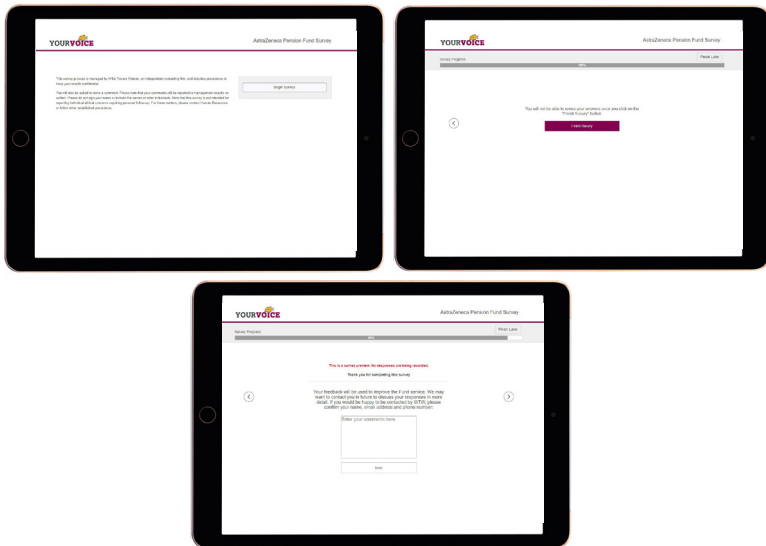


To complete the survey please go to **My AZ Pension** at: <https://epa.towerswatson.com/accounts/astrazeneca> and click on the 'Your voice' survey button or scan the QR code below with your phone or tablet camera to go direct to the survey.



YOUR VOICE

The survey should take you five minutes to complete and there's an option for you to leave your email if you're happy to be asked to take part in more research.



KNOW

Bookmark <https://epa.towerswatson.com/accounts/astrazeneca> My AZ Pension to see more information about the Fund.

Scan this QR code with your phone or tablet camera.



EXPLORE

Explore the news and information available to you to help you consider what more you might need at <https://epa.towerswatson.com/accounts/ZEN/public/AstraZeneca-Pension-Fund-Connect>

Connect to the mobile app

Did you know that you can check your Investment Account's progress via a Mobile App?



DO

Log on to **My AZ Pension** and go to the **My Details** tab and click on the Mobile App. You need to visit this page to generate the login details you need for the app.



KNOW

How to set the app up using the below step-by-step guide.

1. Register

Click the 'Generate Passcode' button for your logins for the app. Your Username and Passcode for the app will appear on screen. If a password reset for the app is needed, then simply follow the same process.

2. Download the app

Download the 'Track My Pension' mobile app to your device. If using an Android device, download the App from the Google Play Store. If using an Apple device, download from the App Store.



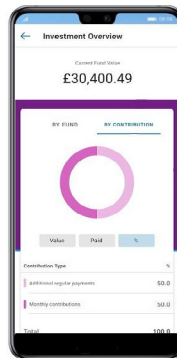
3. Logging into the app

To log in to the app, enter the Username and Passcode created when you registered on My AZ Pension. To access the app in future, save your login to Touch ID, Face ID or create a 6-digit pin.



EXPLORE

- If you want to understand the app more fully, there's a **Track My Pension User Guide** on the **My AZ Pension Mobile App** page. You need to accept the Terms and Conditions before the page will open.
- The app gives you an overview of your Investment Account and enables you to compare investment performance of all the funds you can invest in at a glance.



Find out more about managing your Investment Account in these uncertain times on the My AZ Pension website Stay Connected page.

Countdown to retirement

Life's complicated and then you get to retirement. Below is a high level step-by-step guide to make your journey to retirement easier...



- 1 You'll be sent your Retirement Statement and Guide six months from your normal retirement date.

Note: Any transfer figures quoted are only valid for three months so once you receive this document, the clock is ticking.

- 2



Set up a guidance session with Pension Wise at www.moneyhelper.org.uk/en/pensions-and-retirement/pension-wise



You can start to explore your options at the Fund retirement site at: www.myazretirementoptions.com

If you're over 55 and your Fund pension is worth £30,000 or more the Company will pay for you to receive up to two sessions of financial advice from Wren Sterling, an independent financial adviser.



- 3** If you take advice, start as soon as you can as it can take some time to set up, carry out a financial fact find, arrange an appointment with an adviser, and consider whether you'd like to take their advice.

- 4**  Complete your Retirement or Transfer forms – you can download retirement and transfer forms from **My AZ Pension** at: <https://epa.towerswatson.com/accounts/ZEN/public/AstraZeneca-forms>

- 5** It can take up to two months to receive any Investment Account funds and you may also need to allow time to set up any drawdown arrangements that are set up outside the Fund.

- 6** Any Retirement Account pension is paid on the 25th of the month.

Get digital...

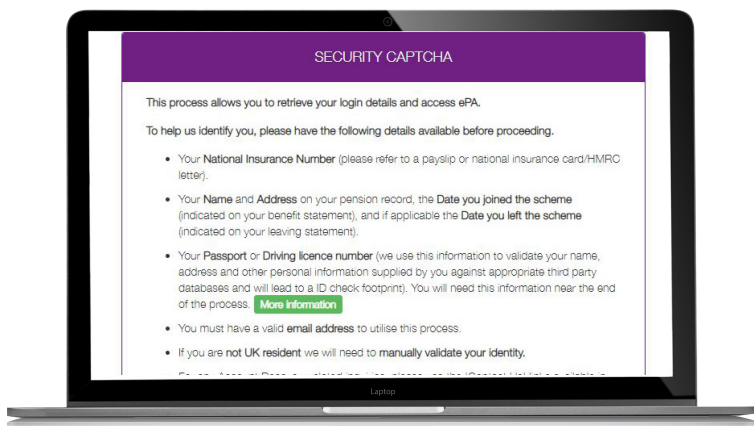
Keep connected...

Over 6,000 members logged on to My AZ Pension, why not join them?

Keeping connected to your bank, supermarket or holiday plans is so easy these days, why not do the same with your Retirement Account or Investment Account. It's secure and greener than mailing statements and this newsletter to you.

Step 1: Logon to My AZ Pension

If you can't find the logon details sent to you in April, you can use the Account Recovery option to set up your details.



Step 2: Update My Mailing Preferences

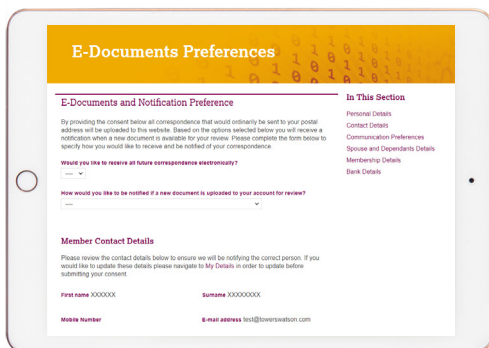
Once you're in, go to the **My Details** tab and click on the **Mailing Preferences** tab.

This then enables you to select your own preferences so that you can receive information about the Fund the way you prefer.

A more convenient way of receiving personalised information – eDocuments

We also recently added a new option to **My AZ Pension** called **eDocuments**. This is where any personalised documents we send you will be added to your record and you can access them online instead of having them mailed to you.

You can set your preferences up so that you receive notifications when a personalised document is available.



The screenshot shows a tablet displaying the 'E-Documents Preferences' form. The form has a yellow header with the title 'E-Documents Preferences'. Below the header, there are two main sections: 'E-Documents and Notification Preference' and 'Member Contact Details'. The 'E-Documents and Notification Preference' section contains a paragraph explaining the purpose of the form and two dropdown menus for selecting preferences. The 'Member Contact Details' section contains a paragraph asking for confirmation of contact details and four input fields for First name, Surname, Mobile Number, and E-mail address. On the right side of the form, there is a sidebar titled 'In This Section' with a list of links: Personal Details, Contact Details, Communication Preferences, Spouse and Dependents Details, Membership Details, and Bank Details.

E-Documents Preferences

E-Documents and Notification Preference

By providing the consent below all correspondence that would otherwise be sent to your postal address will be uploaded to this website. Based on the options selected below you will receive a notification when a new document is available for your review. Please complete the form below to specify how you would like to receive and be notified of your correspondence.

Would you like to receive all future correspondence electronically?

Yes ☐ No ☐

How would you like to be notified if a new document is uploaded to your account for review?

Yes ☐ No ☐

Member Contact Details

Please review the contact details below to ensure we will be notifying the correct person. If you would like to update these details please re-engage to My Details in order to update before submitting your consent.

First name XXXXXXXX Surname XXXXXXXXXX

Mobile Number E-mail address test@towerspension.com

In This Section

- Personal Details
- Contact Details
- Communication Preferences
- Spouse and Dependents Details
- Membership Details
- Bank Details

How we support you

If you have any questions, here's how to connect.

Contact the Fund administrator via:

Don't worry if you can't get online, just call or write to us using these details.



My AZ Pension at
<https://epa.towerswatson.com/accounts/astrazeneca>



Scan this QR code with your phone or tablet camera.



az.helpline@willistowerswatson.com

To help us respond to your enquiry and avoid delay, please include your month of birth, postcode and the last four characters of your National Insurance number in your email.

For security purposes please only include this information in your email.



01737 788115

(9am to 5pm Monday to Friday).
If you call us we'll also ask you for the identity information above.



AstraZeneca Pensions
PO Box 545
Redhill
Surrey
RH1 1YX