SWITCH AND REDIRECTION FORM FOR INSURED FUNDS

Before you make a decision, we recommend you speak to a financial adviser to discuss the choices available to you and the implications of moving your investment. You should also read the notes below.

Notes on switching investments:

You can either choose the specific funds you wish to invest in or a lifestyle profile for each contribution/payment type. Depending on which funds you switch out of and in to, different fund objectives, risk ratings and charges may apply. For details of the full range of insured funds and lifestyle profiles available please see the **Portfolio Plus Funds Guide for Insured Funds** brochure.

Your Member booklet has more information about switching funds, if you need a copy of your booklet or the **Portfolio Plus Funds Guide** please contact us.

This form allows you to:

- Switch existing fund holdings (section 2)
- Alter your fund choice for future contributions (section 3)
- Select a lifestyle profile for one or more contribution/payment types (section 4)

You do not need to provide any switch or redirection instructions for any funds in a contribution/payment type that you choose a lifestyle profile for.

The maximum number of insured funds you can invest in is 50 for each contribution/payment type. The plan can be invested in a maximum of 100 insured funds overall.

Switch and redirection instructions received before 4pm on a working day will normally be processed the same working day. Requests received after 4pm on a working day will normally be processed the following working day. The price used to switch units will be the price two working days after we process this instruction. For example if we process the instruction on the Monday we will use the price on the Wednesday to switch between funds.

Please be aware that if a switch request has been received for your plan in the last few days this may cause a delay in the processing of this request.

If income drawdown payments are being taken from specific funds and, following the switch, an insufficient amount is left to make these payments, we will need a new instruction detailing where the payments should be made from. If we do not receive a new instruction, future income drawdown payments may be delayed.

Please print, sign and return this form so we can process your switch request.

Asset Management Team
Legal & General
City Park
The Droveway
Hove
BN3 7PY

Fax number: 0345 070 6365

Legal & General

1 MEMBER DETAILS

Arrangement number

Your name

National Insurance number

Contact number

Email address

Please only complete the following boxes if you bought your plan through Cofunds Limited:

Intermediary name

Firm name

Aegon product number 8

2 SWITCHING FUNDS

Your switch instruction will be applied to all your Formerly Protected Rights and/or Non Protected Rights under your plan, as you request below.

Please specify whether you want to switch:

- ☐ Formerly Protected Rights only
- ☐ Non Protected Rights (including pension credits) only
- ☐ Both Formerly Protected Rights and Non Protected Rights (including pension credits)

2.1 Funds you wish to switch out of

Please specify the fund name and fund code (as shown in the **Portfolio Plus Funds Guide for Insured Funds** brochure) and percentage of your existing fund holding that you wish to switch out.

Fund name	Fund code	% of the fund holding to switch out
		%
		%
		%
		%
		%
		%
		%
		%
		%
		%
		%
		%
		%
		%
		%
		%
		%
		%
		%
		%

If you wish to switch out of more than 20 funds, please provide the details on a separate signed sheet of paper.

2.2 Funds you wish to switch into

Please specify the fund, fund code and allocation of the proceeds switched out in section 2.1, for the funds you wish to switch into.

Fund name	Fund code	% of the proceeds you wish to switch in
		%
		%
		%
		%
		%
		%
		%
		%
		%
		%
		%
		%
		%
		%
		%
		%
		%
		%
		%
		%
	Total	100%

If you wish to switch into more than 20 funds, please provide the details on a separate signed sheet of paper.

3 REDIRECTION OF FUTURE CONTRIBUTIONS

Please complete this section if you wish to change the fund allocation of your future regular contributions. Please specify the fund name and fund code (as shown in the **Portfolio Plus Funds Guide for Insured Funds** brochure) and percentage of your future regular contributions that you wish to redirect.

Fund name	Fund code	Regular contributions %
		%
		%
		%
		%
		%
		%
		%
		%
		%
		%
	Total	100%

If you wish to redirect into more than 10 funds, please provide the details on a separate signed sheet of paper.

4 LIFESTYLE PROFILES

A lifestyle profile is a standalone option for each contribution/payment type. It cannot be chosen if you decide to invest in any other funds within a contribution/payment type. Lifestyle profiles are not available if you are taking income drawdown.

Lifestyle profile	Contributions
	Regular
	Single

Lifestyle profile	Transfer payments
	Non Protected Rights (including pension credits)
	Formerly Protected Rights

5 AUTHORISATION

I understand that I should read the notes on page 1 of this form.

I authorise Legal & General to switch my fund(s) and alter my fund choice for future contributions in accordance with the instructions on this form.

Your Signature

Date (DD/MM/YYYY)

legalandgeneral.com

Legal & General (Portfolio Management Services) Limited
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