

## FUND SWITCH INSTRUCTION.

This form should be completed if you have a **Legal & General Portfolio Bond, Legal & General Discounted Gift Portfolio Bond, Legal & General Investment Bond** or a **Legal & General With Profits Bond** and you wish to change your fund selection. If you wish to change the fund selection for more than one bond, please fill in a separate form for each bond.

**Please complete in BLOCK CAPITALS. We recommend that you seek financial advice before you complete this instruction form.** If this form is received by us unsigned, undated or otherwise incomplete, we will return it to you for full completion. No switches will be made until a fully completed instruction is received.

Please indicate overleaf the funds of your choice and the percentage to be allocated out of and into each fund. Full details of the funds available and annual fund/management charges can be found in the **Funds key features** or the **With Profits Bond Funds Guide**. Please ask your adviser if you would like a copy.



**Please return the completed form to:** Legal & General Assurance Society Limited, Asset Management Team, City Park, The Droveaway, Hove BN3 7PY.

### NOTES FOR COMPLETION

#### Number of funds:

- If you have a Portfolio Bond or Discounted Gift Portfolio Bond you can invest in a maximum of 50 funds.
- If you have an Investment Bond you can invest in a maximum of 10 funds.
- If you have a With Profits Bond you can invest in a maximum of eight funds.

#### If you are switching out of With Profits:

- We may reduce the value of your investment by a market value reduction. To understand how this works, please visit: [legalandgeneral.com/existing-customers/with-profits-support/guides-and-factsheets/](https://legalandgeneral.com/existing-customers/with-profits-support/guides-and-factsheets/)
- Any guarantees applicable to your bond will be lost if you switch out of With Profits.
- You cannot switch out of With Profits until the fifth anniversary of your most recent investment.
- If you're switching out of With Profits, you must switch all of your investment in the bond. You will not be able to switch back to With Profits at a later date.

Please refer to your **Policy Provisions, Contract Document** or **Product Guide** for full details on switching funds.



## SECTION D – AUTHORISATION

I hereby authorise Legal & General to switch my fund(s) in accordance with this instruction. I understand the switch is subject to the conditions shown in my Policy Provisions, Contract Document, Product Guide and/or Fund Guide (where appropriate).

Policyholder(s) signature(s)

DD/MM/YYYY

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Policyholder(s) signature(s)

DD/MM/YYYY

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All policyholders must sign and date this form.



[www.legalandgeneral.com](http://www.legalandgeneral.com)

**Legal & General Assurance Society Limited.**  
Registered in England and Wales No. 00166055.  
**Registered office:** One Coleman Street, London EC2R 5AA.

Authorised by the Prudential Regulation Authority and regulated by the  
Financial Conduct Authority and the Prudential Regulation Authority.

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