

SWITCH AND REDIRECTION FORM FOR INSURED FUNDS.

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. For details of the full range of insured funds and lifestyle profiles available please see the **Portfolio Plus Funds Guide for Insured Funds** brochure.

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. We'll accept this by fax or post.

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Fax number: 0345 070 6365

Or for plans bought through Cofunds send to:

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