# Switch and redirection form

Not for use on portfolio bonds

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**Before completing this form please refer to the 'Switch and redirection help guide' (MSP2256).**

**Please complete this form by typing in CAPITAL letters. Any unclear instruction will not be performed. A list of funds and their currencies is available on www.zurichinternational.com. Simply select your region and then the 'Funds' tab at the top of the page. Switch only: complete sections 1, 2 and 5. Redirect only: complete sections 1, 3 and 5. Switch and redirect: complete sections 1, 2, 3 and 5. Retirement investment strategy (RIS)/Automatic investment strategy (AIS): complete sections 1, 4 and 5.**

**Please note that no switches or redirections can be made where the policy owner(s) is/are resident in the United States.**

## 1 Policy details

I/We authorise you to change the fund holding of the following policy, as shown below:

| Policy number | Scheme number (corporate clients only) | ◯ IWA/WPA/Global Choice plan |
|---|---|---|
| | | |

## 2 Switch present fund holding to new fund holding

| Sell from present fund holding/Switch from: Five character fund code | % | Buy into new fund holding/Switch to: Five character fund code | % |
|---|---|---|---|
| | | | |

Please click to automatically calculate the total **Total**

## 3 Redirect future payments

| Invest future payments into: Five character fund code | % |
|---|---|
| | |

Please click to automatically calculate the total **Total**

## 4 Investment strategies (Please select the required strategy and currency.)

I/We want my/our policy/policies to follow the:

- ◯ Retirement investment strategy in ◯ GBP ◯ USD ◯ EUR
- ◯ Automatic investment strategy in ◯ GBP ◯ USD ◯ EUR
- ◯ Automatic investment strategy – Series B (in USD only) in ◯ USD

## 5 Authorised signatory/signatories details (Please ensure that instructions for joint policies are signed by both parties)

Signature(s)

Date Day Month Year

Policy owner 1

Family name | Forename(s)

Policy owner 2

Family name | Forename(s)

FIA name

Job title

Relevant financial professional

Please provide us with details of the easiest way to contact you in the event of a query with your instruction.

Telephone number

Email address

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