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 GU).
Please complete this form by typing in BLOCK CAPITALS. 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.

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 policy

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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