Switch and redirection

Additional fund selection form

(To be completed where you wish to switch or redirect more than 10 funds)

This form should only be used if you have an International Wealth Account (IWA)/Wealth Preservation Account (WPA) policy or a Vista policy issued after January 2005.
Before completing this form please refer to the 'Switch and redirection help guide' (MSP2256). Please complete this form 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.

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. Switching present fund holdings 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	%
		Total	

3. Redirect future payments

Invest future payments into: Five character fund code					%
				Total	

Authorised signatory/signatories details (please ensure that instructions for joint policies are signed by both parties).

Signature(s)

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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