

Switch and redirection Checklist

Please use this checklist for all switch and redirection instructions. Please ensure that you have completed and included all the correct information, so that we are able to process your instruction as quickly as possible.

- ✓ **Please tick to confirm that you have checked the following:**
- The switch form has to be completed where required, in BLOCK CAPITALS and the instructions must be clear.
- Fund choices selected are available for your policy. Fund details can be found on our website at www.zurichinternational.com. Simply select your region and then the 'Funds' tab at the top of the page.
- The switch or redirection instruction does not exceed the maximum number of funds allowed for the policy. Note: For International Wealth Account, Wealth Preservation Account policies and Vista policies (issued after January 2005) you may hold a maximum of 30 funds at any one time. For all other policies, including Vista policies issued prior to January 2005, you may hold a maximum of 10 funds at any one time.
- 'Switch to' total adds up to 100%.
- All policy owners/joint policy owners/trustees or authorised signatories have signed and dated the form where required.
- For switch forms signed by the relevant financial professional on behalf of the client please ensure a Fund investment advisor (FIA) form (MSP2351) is completed. **(We require client authorisation on the FIA form prior to receipt of the switch form, otherwise we will be unable to process the switch).**

Where to send your completed form

Switch cut off times

Your area	Switch fax number	Telephone number	Local cut-off times
Asia*	+852 3018 7516	+852 3405 7150	16.00hrs
Middle East**	+971 4 363 7429	+971 4 363 4444	13.00hrs
Isle of Man	+44 1624 691055	+44 1624 691111	11.00hrs
Corporate Pensions***	+44 1624 691055	+44 1624 691013	11.00hrs

* Asia cut-off time is Hong Kong/Singapore local time.

** Middle East cut-off time is United Arab Emirates local time.

*** For corporate schemes some restrictions apply, if you are unsure please speak to your scheme administrator or the Isle of Man Corporate Pensions department.

What happens now?

- Please note that the dealing date is determined by the date and time of receipt of the completed switch and redirection form in the relevant Zurich office.
- For the majority of funds¹, price dates for switching will be two Isle of Man working days after receipt. For switches received on a Saturday or Sunday, these will be treated as if received on a Monday or the next available Isle of Man working day where appropriate.
- A switch confirmation letter will be forwarded via post detailing your requested change in funds.
- For brokers with ZIO access, switch changes will be available online two days after the receipted date.

¹ Some fund managers may apply longer redemption deferral periods and require a certain number of days notice before any sales can be made.

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