Fund switch request and redirection

Canada Life™

Fund switch request and redirection

This form is to request a fund switch to be completed as a single movement. It may be possible for you to switch funds gradually over a period of time using the phased investment option, please see 'Important notes'.

Full name of policyholder/member and scheme name

Policy number(s)

Please state **all** policies to be switched (numbers not listed will not be switched). See 'Important notes'.

This request applies as follows (tick one box only):

- switch some of existing funds (please complete A & B below) ☐
- switch **all** existing funds (please complete B below) ☐
- redirect future premiums only* (please complete B below) ☐
- switch existing funds & redirect future premiums* (please complete A & B below) ☐
- rebalancing existing funds (please complete B below) ☐

* Regular premium paying policies only

A. List the name(s) of the fund(s) that you wish to switch out from and the percentage that you wish to move (between 0% and 100%)

B. List the name(s) of the fund(s) that you wish to switch into and the percentage of the overall amount that you wish each fund to receive (between 0% and 100%)

Fund(s) to switch out from;	% to switch out	Fund(s) to switch into**;	% to switch in
		MUST TOTAL	**100%**

You can invest in a maximum of 10 funds at any one time

Signatures and declaration

In this section, 'I/we' and 'my/our' means the policyholder/member or the trustees/professional advisers making the request.

Please switch the fund holdings in accordance with my/our instructions.

I/We understand that where I am/we are switching existing units (as shown in section A), the units being switched out will be cancelled at the relevant bid price on the day following receipt of this request. Units will then be purchased at the relevant bid price on the day following receipt of this request in my/our new chosen fund(s).

This request must be signed by the member/policyholder. In addition, the signatures of the trustees will also be required (if the policy is an occupational pension the trustees will normally be the company).

A professional adviser (a suitably authorised individual, partnership, company or other body which is/are appointed by the policyholder to make investment decisions on their behalf), may only sign this form if specific fund switch authority is held by Canada Life.

Please print your name, sign and date (and tick the relevant box(es)).

Full name (BLOCK CAPITALS)

Date (day, month, year)

Signature

Policyholder/member ☐ Power of attorney ☐

Trustee ☐ Professional adviser ☐

Full name (BLOCK CAPITALS)

Date (day, month, year)

Signature

Policyholder/member ☐ Power of attorney ☐

Trustee ☐ Professional adviser ☐

Full name (BLOCK CAPITALS)

Date (day, month, year)

Signature

Policyholder/member ☐ Power of attorney ☐

Trustee ☐ Professional adviser ☐

Full name (BLOCK CAPITALS)

Date (day, month, year)

Signature

Policyholder/member ☐ Power of attorney ☐

Trustee ☐ Professional adviser ☐

Important notes

1. All policy numbers to be switched must be listed. For a series of multiple policies, either list policies individually or if the whole multiple is to be switched, complete with the first and last number such as R1234567 – 599 incl.

2. All policyholders/trustees must sign this form. No other signatures are acceptable unless we have specific switching authority, showing the policyholder(s)/trustees giving authority for us to accept instructions from another party.

3. Where a partial switch has been requested, the whole value of the funds switching in section A will be totalled and reallocated as per the funds and percentages shown in section B.

4. If we receive the correctly completed form before 3 pm we will use the price date of the next valuation day. **Please note:** Whilst most funds are valued daily, some are valued less often.

   There may be a delay in carrying out a request to switch if we receive an incomplete request. If this is the case the price date we will use will be the day after we receive the correctly completed form.

5. Switch fees, where applicable, will be deducted from units.

6. The phased investment option is available on the:
   - Select Account (at any time)
   - Flexible Investment Bond (at any time)
   - Total Access Bond (at any time)
   - Select Investment Bond (at any time)
   - Trustee Investment Plan (on single premiums only at any time)
   - Annuity Growth Account (at outset only and three-year reviews)

   Phased investment can be set up by completing and returning a 'Phased investment request form'.

7. For certain monthly plans, only units allocated up to the last policy anniversary may be switched. Subsequent allocations may be switched at the next anniversary.

8. Please note that not all funds listed in our investment updates or on our website are available for all Canada Life products. Please contact our Customer Service team on **0845 6060708** for more information.

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