

LV= Smoothed Managed Funds Bond

Full Surrender Instruction Form

Important Notes

We strongly recommend you speak to your financial adviser before making a decision.

You can use this form to instruct us to fully cash in your bond.

The Smoothed Managed Funds Bond Conditions contains full information about cashing in under section A11, so you may wish to refer to this section for more details.

- Upon full encashment of the last bond you may hold you'll be unable to invest in another LV= Smoothed Managed Funds Bond for 12 months from the date your last bond closed.
- In some circumstances we may wait up to 10 working days, and in some exceptional circumstances even longer before we process your request, as set out in your Smoothed Managed Funds Bond Conditions under section D1. If this is the case, we'll let you know when we receive your instruction.

Find out how we use your personal information, and what rights you have by visiting [LV.com/dataprotectionlife](https://www.lv.com/dataprotectionlife). This includes who we are, how long we hold your information, what we do with it and who we share it with. Please ensure that you advise anyone else whose personal details you are providing in this form where they can find this information.

Bond number

Bondholder 1

Bondholder 2

I/We wish to surrender the above Bond with immediate effect.

I/We understand that the surrender value I/we will receive will be calculated at the date the Bond is surrendered so may be more or less than the amount quoted on the accompanying letter.

Declaration

I/We authorise and request Liverpool Victoria Financial Services Limited to cash in all the units from my/our Bond and pay me/us the surrender proceeds as detailed below, in full and final settlement of all claims and demands against this Bond.

Payment instructions

Please note that we can either send a cheque for the full amount to the address held on our records, alternatively we can pay this claim directly into your bank account. Please provide proof of account ownership if you wish for this method, either a recent bank statement (within 3 months), a copy of a cheque, or a copy of your debit card.

Cheque Bank account

Name(s) in which account is held:

Account number

Sort code / /



Bond documents required

Please tick to show which items you are enclosing.

- Bond Summary
- Deed of Assignment, and / or reassignment
- Trust Deed and any Deed of Appointment for change of Trustees
- Photographic ID such as a passport or driving license (if value is over £100,000)

If any item is missing or lost, please contact your Financial Adviser. Alternatively you can call us at local rates on **0800 681 6292**. For Textphone first dial 18001. We are here from 8:30am - 5:30pm Monday to Friday. To help us continually improve customer service, we may record and/or monitor your calls for training and audit purposes. You can get this and other documents from us in Braille, large print and other formats by contacting us or your financial adviser

To be signed by Bondholder(s) or Trustees as appropriate

1st Bondholder/Trustee name

(if applicable)

Signature

Date

/

/

2nd Bondholder/Trustee name

(if applicable)

Signature

Date

/

/

Please return this form to us in the envelope enclosed

You can get this and other documents from us in Braille, large print or on audio by contacting us.

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