

All-In-1 Investment Bond/ Guaranteed Capital Bond

Fund Switch/Guarantee Request Form



Please use this form if you want to switch fund, buy a guarantee, replace your existing guarantee, or cancel your guarantee. **Please note that you can't switch funds in the Guaranteed Capital Bond.** Please see your Key Features document and the Policy Conditions if you have any queries, or contact us.

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

Bondholders(s) Name(s) _____

Bond Number _____

Fund Option Switch – Please tick one box only

If you wish to remain in your current fund option, or you have a Guaranteed Capital Bond please don't complete this section.

Please choose which fund you wish to switch your total investment into:

Fund Option Name

Growth

Balanced

Cautious

For details of each fund option please refer to the All-In-1 Investment Bond Key Features document and Policy Conditions.

Note: You can switch free of charge once each Bond year but if you do this more often, we'll charge you £25 each time. If you have a guarantee this will end when you switch your fund option. If you want to replace this by buying a new guarantee, please tick the Existing Guarantee Replacement box below.

Guarantees – Please tick one box only

Guarantee Purchase

I do not currently have a guarantee and wish to buy one in my existing fund option, or in the new fund option chosen above.

Existing Guarantee Replacement

I have an existing guarantee and wish to replace it with a new one in my existing fund option, or in the new fund option chosen above.

Existing Guarantee Cancellation

I have an existing guarantee which I wish to cancel. I do not want to replace it.

For details of guarantees please refer to the All-In-1 Investment Bond/Guaranteed Capital Bond Key Features document and Policy Conditions.

For the current additional monthly management charge on guarantees please contact us.

Note: You can buy a new guarantee or replace an existing free of charge once each Bond year but if you do this more often, we'll charge you £25 each time. You can cancel a guarantee at any time.

Please allow 3-5 working days for your request to be dealt with. We'll write to you to confirm when the change has been made. We'll also confirm the monthly management charge if you add or replace a guarantee.

If you need advice on any of the above options please speak to your financial adviser.

For joint Bonds both Bondholders must sign. If the Bond is held in trust, all trustees must sign.

Bondholder/Trustee name

Bondholder/Trustee name

Signature

Signature

Date / / (DD/MM/YYYY)

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