

Flexible Guarantee Bond

Fund Switch/Guarantee Request Form

(For bonds started on or after 20 August 2012 and have Bond Conditions with reference FGB3)



Please use this form if you want to switch fund, buy a guarantee, replace your existing guarantee, or cancel your guarantee. Please see your Key Features document and the Bond 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.

Bond owner(s) name(s) _____

Bond number _____

Fund Option Switch – Please tick one box only

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

Fund Option Name

Managed Growth

Balanced Series 2

Cautious Series 2

For details of each fund option please refer to the Flexible Guarantee Bond Key Features document and Bond Conditions.

Note: You can switch your investment free of charge up to three times each bond year but if you do this more often, we'll charge you £25 each time. If you've got 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 'Buy a new or replace an existing guarantee' box below.

Guarantees – Please tick the option you require

(Please note that these guarantee options are only available if your bond started on or after the 20 August 2012 and your Bond Conditions have the reference FGB3).

Buy a new or replace an existing guarantee

I don't currently have a guarantee or I wish to replace an existing guarantee in my existing fund option, or in the new fund option chosen above. Please select which guarantee term you require by ticking one box.

Managed Growth

10 years

Balanced Series 2

10 years

Cautious Series 2

8 years

9 years

10 years

Cancel an existing guarantee

I've got an existing guarantee which I wish to cancel. I no longer want a guarantee.

For details of guarantees please refer to the Flexible Guarantee Bond Key Features document and Bond Conditions.

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

Note: You can buy a new guarantee or replace an existing guarantee at any time. You can do this 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 bond owners must sign. If the bond is held in trust, all trustees must sign.

Bondholder/Trustee name

2nd Bondholder/Trustee name

Signature

Signature

Date / / (DD/MM/YYYY)

Date / / (DD/MM/YYYY)

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



Liverpool Victoria Friendly Society Limited: County Gates, Bournemouth BH1 2NF.

LV= and Liverpool Victoria are registered trade marks of Liverpool Victoria Friendly Society Limited (LVFS) and LV= and LV= Liverpool Victoria are trading styles of the Liverpool Victoria group of companies. LVFS is authorised by the Prudential Regulation Authority and regulated by the Financial Conduct Authority and the Prudential Regulation Authority. Registered address: County Gates, Bournemouth, BH1 2NF. Tel: 01202 292333.

21135-2018 02/18