

Flexible Guarantee Bond

Fund Switch/Guarantee Request Form

Important Notes

Please use this Instruction Form for bonds started on or after 20 August 2012 and have Bond Conditions with reference FGB(S2) or FGB(S3):

- Flexible Guarantee Bond Series 2
- Flexible Guarantee Bond Series 3

You can use this Instruction Form to:

- Switch funds
- Buy a guarantee
- Replace your existing guarantee
- Cancel your guarantee

Please return this completed form to:

LV=
PO BOX 342
Wymondham
NR18 8HS

If you have any queries or you'd like help completing your instruction, please talk to your Financial Adviser or you can call us on **0800 681 6292**, between 9am - 5pm Monday to Friday.

For the Flexible Guarantee Bond Series 3 we'll always wait for 10 Business Days from receipt of the instruction before we process any request to change your Fund Option. Once you've asked us to change your Fund Option, you can't change your mind, and will have to wait a further 10 Business Days before we process any request to change it back again. During the waiting period we will continue to take any charges due or requested withdrawals. 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 and see your Key Features document or, from January 2018, the Supplementary Information Document and Bond Conditions.

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

Cautious Series

For details of each fund option please refer to the Flexible Guarantee Bond Key Features document or, from January 2018, the Supplementary Information 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 FGB(S2) or FGB(S3).

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

Balanced Series 2

Cautious Series 2

10 years

10 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 or, from January 2018, the Supplementary Information 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.

Declaration

I can confirm I have read the Key Considerations detailed on the 2nd page of this form (Please tick the box to confirm)

For joint bonds, both bond owners must sign. If the bond is held in trust, all trustees must sign.

1st Bondholder / 1st Trustee

Print Name

Signature

Date / / (DD/MM/YYYY)

2nd Bondholder / 2nd Trustee

Print Name

Signature

Date / / (DD/MM/YYYY)

3rd Trustee

Print Name

Signature

Date / / (DD/MM/YYYY)

4th Trustee

Print Name

Signature

Date / / (DD/MM/YYYY)

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