

# LV= Smoothed Managed Funds Bond

## Fund Switch/Guarantee Cancellation Form

### Important Notes

Please use this Instruction Form for bonds started on or after July 2021 and have Bond Conditions with reference LV=SMB (03/2022).

You can use this Instruction Form to:

- Switch funds
- 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.

### Key Considerations

- When you change your fund option, any guarantee you have will be cancelled and you won't be able to add a new guarantee onto your new fund option.
- We'll normally make the fund option switch 10 working days after we receive your instruction, in line with condition A9 of our bond conditions.
- You can invest money into one fund option only in an individual bond. If you choose to switch your fund option, all of the investment will be moved into the new fund option of your choice.
- Your new fund option has a different investment objective and asset allocation and so will produce different results from your original fund option. Further details can be found online at [LV.com/investments/investment-products](https://www.lv.com/investments/investment-products).
- The plan invests in stocks and shares and other investments which can rise and fall in value. This means you're not certain to make a profit and you could get back less than you invested.
- Please remember that past performance doesn't reflect what will happen in the future. The value of your investment can go down as well as up.
- If you use this form to cancel a guarantee on a bond you won't be able to take out a fresh guarantee for the bond in the future.

Please review your **Supplementary Information Document** and the **Bond Conditions**. The latest versions can also be found online at [LV.com/investments/investment-products](https://www.lv.com/investments/investment-products).

#### Note:

We recommend that you speak to your Financial Adviser before making any changes to your LV= Smoothed Managed Funds Bond. Choosing what to do with your plan is an important decision and one that you may not be able to change in the future.

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

Smoothed Managed Extra Cautious

Smoothed Managed Cautious

Smoothed Managed Balanced

Smoothed Managed Growth

Smoothed Managed Growth Plus

#### Note:

You can switch fund option 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 and a new guarantee cannot be purchased.

We apply a 10 Working Days waiting period for all fund option switch requests. Once you've asked us to change your fund option, you cannot change your mind, and will have to wait a further 10 Working Days before we process any request to change it back again. During the waiting period we'll continue to take any charges due or requested withdrawals.

We'll write to you to confirm when the fund option switch has been made.



## Guarantee cancellation

### Cancel an existing guarantee

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

#### Important:

Once a guarantee is cancelled you will not be allowed to add another guarantee.

We'll write to you to confirm when your guarantee has been cancelled.

## Declaration

I can confirm I have read the Key Considerations detailed on the 1st page of this form (Please tick the following box)

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

### 1st Bondholder/Trustee name

Signature

Date

/ / (DD/MM/YYYY)

### 2nd Bondholder/Trustee name

Signature

Date

/ / (DD/MM/YYYY)

### 3rd Trustee name

Signature

Date

/ / (DD/MM/YYYY)

### 4th Trustee name

Signature

Date

/ / (DD/MM/YYYY)

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