

Request for Pension Fund Switch

Existing units and/or future fund allocation. If the switch relates to a plan with a number ending in RP you should complete form 'Request for Pension Fund Switch – RP products only'.

The notes in Section 3 of this form give general information about the fund switch facility.

An important note for plans which include former Protected Rights Benefits.

We will assume your former Protected Rights Benefits (where applicable) are to change in line with the instructions detailed at right. If you would like to switch the former Protected Rights Benefits to a different fund selection please tick here ☐ and attach a separate fund switch form making it clear on that form that the selection you have chosen applies to your former Protected Rights only.

1 Complete this section for

Executive Pension Plans (ending BC or BD)

Executive Retirement Plans (ending BE, BEA, BH or BG)

Personal Retirement Plans (ending DK or DKA)

Personal Pension Plans (ending DL)

Adaptable Pension Plans (ending PB)

Additional Voluntary Contribution Plans (ending VA or VB)

For details of the funds available and their charges please refer to the 'Zurich pensions fund charges and expenses' sheet available from your adviser or directly from us.

For details of the Zurich retirement planning fund range please visit zurich.co.uk/targetretirementfunds – each fund in the range targets a particular retirement objective to suit your needs.

Plan/Account number

P																	
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Plan holder's name

A Allocation of future payments

This instruction applies only to the allocation of future payments. If this instruction is not completed, future payments will continue to be allocated as at present.

If you want to change the funds that your existing units are linked to, you should complete either B or C below.

Fund name (Maximum of 10 funds)	%
Total	100

Please ensure that the total = 100% (only whole % can be selected)

This section should be used to achieve a certain investment position following the fund switch. Please specify the percentage of investment which you wish to have in each fund. You may invest in up to 30 funds at any one time although you may only switch up to 10 funds with one instruction.

Please ensure that the total = 100% (only whole % can be selected)

This section should be used if you require a fixed percentage of existing fund(s) to be switched to one or more funds.

Section 1 Authorisation (see Note 1)

Date

Signed for and on behalf of (company name)

Director/secretary signature

The relevant Insolvency Practitioner(s) should sign on behalf of the company if appropriate and attach a copy of the Notice of Appointment.

Signatures of individual trustees

Trustee

Name in BLOCK CAPITALS

Trustee

Name in BLOCK CAPITALS

Trustee

Name in BLOCK CAPITALS

Trustee

Name in BLOCK CAPITALS

To be dated by the last person to sign the form

Date

D

D

M

M

Y

Y

Y

Y

2 Complete this section for Growth Retirement Plans (ending AK, CK or CKA)

Plan number

Plan holder’s name

Please note that you may only link your plan to one fund at a time.

Please specify the current fund to which your plan is linked and the new fund to which existing units, and future payments should be directed.

For details of the funds available and their charges please refer to the ‘Zurich pensions fund charges and expenses’ sheet available from your adviser or directly from us.

Existing fund name	New fund name

Section 2 Authorisation (see Note 1)

Signature

Date

D

D

M

M

Y

Y

Y

Y

3 Points to note

1. Signatories Valuations

- For Growth Retirement Plans, Personal Retirement Plans, Personal Pension Plans, FSAVC Pension Plans and personally assigned Executive plans – the authorisation must be signed by the plan holder.
- For Executive Pension, Executive Retirement and Group Executive Retirement Plans – the authorisation must be signed by either all the Trustees of the plan individually or their authorised signatory or by an officer of a Sole Corporate Trustee.

2. Valuations

The fund switch will be effected using the bid price of the relevant units (we will use a single unit price for funds which do not have a bid and offer price) at the next day's valuation of the fund(s) following receipt of this form, correctly authorised, at Zurich's Head Office before 10.30am. If the request is not received before 10.30am, we treat it as being received the next day.

3. We offer a range of funds which are managed by a number of different fund managers. Switching into or out of these funds may be allowed at Zurich's discretion.
4. Some funds have extra charges, for details of the funds available and their charges please refer to the 'Zurich pensions fund charges and expenses' sheet. This document is available from your adviser or directly from us.

Please remember that 'Fund Switch' and 'allocation of future payments' are separate transactions and we need clear separate instructions for each. If you have any questions please call our Customer Services team on 0370 241 6950 or fax us on 0370 243 4806 for products ending BC, BD, BE, BEA, BG or BH or 0370 243 4809 for all other products.

We may record or monitor calls to improve our service.

Please let us know if you would like a copy of this in large print or braille, or on audio tape or CD.