

Zurich's retirement planning funds online choices form

Name	Plan number
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Please move all my existing investments **and** direct all future payments I make to the: (tick one box only)¹

☐ Zurich Target Lump Sum Fund	☐ Zurich Target Annuity Fund	☐ Zurich Target Drawdown Fund
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Please select the period during which you're planning to retire (tick one box only):²

☐ 2019 – 2021	☐ 2022 – 2024	☐ 2025 – 2027
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¹ If you want to invest in more than one retirement planning fund, or in combination with another fund(s), please contact us. We strongly recommend you seek advice first.

² If the current retirement age we hold for you is outside the three year period you select here, we'll change it to the age you'll reach during the middle year of your selection.

We can't advise you on whether the fund you are selecting is suitable for your circumstances. If you need advice you should speak to a financial adviser before making any investment decision. They will be able to advise you on the suitability of the funds based on your personal circumstances. You may be charged for the advice you receive.

If you want to invest in other funds we have available, please go to **zurich.co.uk** or contact us directly so we can send you details of the funds available on your plan.

We will administer the change of investments in line with your terms and conditions. If you need a copy please let us know.

The transaction will take place at the next day's valuation of the fund(s) following receipt of this form, fully completed and signed, 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.

By signing this form you confirm that you've read the information we have made available online at **zurich.co.uk/targetretirementfunds**.

Signature	<table style="width: 100%; border-collapse: collapse;"> <tr> <td style="text-align: center; font-size: small;">Day</td> <td style="width: 20px; height: 20px; border: 1px solid black;"></td> <td style="width: 20px; height: 20px; border: 1px solid black;"></td> <td style="text-align: center; font-size: small;">Month</td> <td style="width: 20px; height: 20px; border: 1px solid black;"></td> <td style="width: 20px; height: 20px; border: 1px solid black;"></td> <td style="text-align: center; font-size: small;">Year</td> <td style="width: 20px; height: 20px; border: 1px solid black;"></td> <td style="width: 20px; height: 20px; border: 1px solid black;"></td> <td style="width: 20px; height: 20px; border: 1px solid black;"></td> <td style="width: 20px; height: 20px; border: 1px solid black;"></td> </tr> <tr> <td colspan="11" style="text-align: left; font-size: small;">Date</td> </tr> </table>	Day			Month			Year					Date										
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Please let us know if you would like a copy of this in large print or braille, or on audiotape or CD