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.

Plan/Account number **P**

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)

B Fund switch of existing units – resultant fund switch

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.

Fund name	%
Total	100

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

C Fund switch of existing units – specified fund switch

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

Existing fund name	New fund name	Percentage to be switched
		%
		%
		%

Section 1 Authorisation (see Note 1)

Signature	Date	
Signature	Date	
Signature	Date	
Signature	Date	

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

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	

3 Points to note

1. Signatories
   - 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 planholder.
   - 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.

5. Full details of switching facilities and any charges which may be applied are available on request.

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.

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.

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