

FUND SWITCHING FORM

1 YOUR DETAILS

1	Policy number	
2	Full name of first policyholder	
3	Full name of second policyholder (if applicable)	
4	Email	
5	Contact phone no.	

2 FUND SWITCH FOR EXISTING INVESTMENTS

- Switch requests received before 5pm are processed using the close of business price for the following working day. Switch requests received after 5pm will use the close of business price in two working days' time.
- For a list of fund, refer to our website www.utmost.co.uk

Switch Out – Fund Name	Amount, number of units or percentage	Switch In- Fund Name	Amount, number of units or percentage

REST ASSURED

Calls may be recorded for training or monitoring purposes.

Contact us at: Walton Street, Aylesbury, Bucks, HP21 7QW Tel : 0330 159 1530 Fax : 0845 835 5765 : www.utmost.co.uk

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3 FUTURE CONTRIBUTIONS

If you are currently paying into the policy and want the investment of any future contributions to be changed, please list the funds and percentages you would like to contribute to here.

% of future premiums to be redirected	To (name of new fund)

4 DECLARATION

I/we declare that the instructions given in this form shall be irrevocable

This form must be signed by all policyholders.

Signature of first or only policyholder
Full name of first or only policyholder
Date

Signature of second policyholder
Full name of second policyholder
Date

FUND SWITCHING – USEFUL INFORMATION

- Not all funds are available to all policies. To check which funds are available, please contact us.
- If the fund you have chosen does not have a series with the same charges as your existing fund, we will use the fund with the nearest charges.
- If your policy is a Topaz Plan, it is only possible to invest future premiums and past investments in the same single fund
- If your policy is a Flexible Mortgage Plan, Flexible Endowment Plan, Sapphire Plan, Diamond Plan, Amethyst Plan, Ruby Plan or an Option Plan it is only possible to invest future premiums in a single fund.
- Tax Exempt funds are only available if you hold a Tax Exempt policy.
- If you have a policy invested in the any of the following funds you cannot switch funds or redirect future investments: Schroder UK Alpha Plus Fund (Institutional Z Class Income), Halifax UK Growth, Life Property 1st issue, Life Deposit Homefund, Life Property Distribution series 3F and 8F and Pension Property Distribution.
- If your funds are invested in a Unitised With Profits fund and you switch into another fund, you won't be able to switch back into the Unitised With Profits fund. There may also be a market value reduction, please refer to your policy conditions.