

Switch form

Please fax to: +44 (0)1624 625900 (Please note: the original of this form is not required)

Policy number

Policyholder

Daytime phone number

It's essential that all relevant sections of this form are completed in full, or the switch may be delayed.

Please don't complete this form until you've read all of the information regarding your options.

Switch instructions

A. Switch from: (either monetary amount or percentage (in whole figures) of existing fund to be switched).

Fund number	Fund name	Monetary amount or percentage

B. Switch to: (monetary amount or percentage of proceeds in whole percentages only, less any charges, to be invested).

- If you are switching into CMI Guaranteed Growth Fund 7, please note this fund has a minimum investment term of ten years.
- If you are switching into Offshore With-Profits 6, please note that this fund has a higher annual management charge than previous versions of the fund.
- Please ensure you complete the fund number and fund name.

Fund number	Fund name	Monetary amount or percentage
Total (must equal section A above)		

If you want to sell units from a CMI Offshore With-Profits or CMI Guaranteed Growth Fund, there may be a market value adjuster (MVA) applicable.

Please note: By signing this switch request form you agree to any MVA applicable at the time the switch is made.

Switch instructions continued

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Fund number	Fund name	Monetary amount or percentage

B. Switch to: (monetary amount or percentage of proceeds in whole percentages only, less any charges, to be invested).

Fund number	Fund name	Monetary amount or percentage
Total (must equal section A above)		

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Total (must equal section A above)		

Redirection of premiums

If you have a regular premium policy, do you wish all future premiums to be directed to the new funds? Yes No

If 'No', please give details below how future premiums are to be applied.

Fund number	Fund name	Monetary amount or percentage
Total		

Signatures of all policyholder(s)/trustees/assignees

Signature

Date (dd/mm/yyyy)

Signature

Date (dd/mm/yyyy)

Signature

Date (dd/mm/yyyy)

Signature

Date (dd/mm/yyyy)

Important notes

1. The first 12 switches in any plan year are free, thereafter a charge will be made as detailed in the policy provisions.
2. The bid price of sold and purchased units will be calculated at the valuation following acceptance of your request.
3. You can hold a maximum of ten funds at any one time.

Please return the completed form to:

RL360° Services
RL360 House
Cooil Road
Douglas
Isle of Man
IM2 2SP
British Isles

or fax on +44 (0)1624 625900.