

Guaranteed Growth Fund switch form

To: RL360° Services

Policy number

Please complete this form if you wish to switch some or all of your investment into the unit-linked fund range.

Please do not complete this form until you have read all the information regarding your options.

Switch instructions

Please indicate whole percentages only. The total percentage to be switched must add up to 100%.

In accordance with your recent correspondence, I/we instruct that the Guaranteed Growth Fund holding(s) which you recently indicated are reaching their maturity date and should be switched with effect from the specified maturity date into the following funds:

Fund name	Fund number	Switch percentage
		%
		%
		%
		%
		%

Please note: Any switches out of the Guaranteed Growth Fund on any date before the end of the Guaranteed Growth Fund investment term, may attract a market value adjuster. If we don't receive your instructions before the end of the Guaranteed Growth Fund investment term, your investment will be automatically switched to the equivalent, or nearest equivalent, currency reserve fund, and will remain invested in that fund until we receive further instructions from you. If you wish to switch some of your investment and surrender the rest, please send us a *Surrender Form* with this *Switch Form*. Please make sure you read the important notes carefully before signing this form.

Further notes

Signatures of all policyholder(s)/trustees/assignees

Signature	<input type="text"/>	<input type="text"/>
Date (dd/mm/yyyy)	<input type="text"/> <input type="text"/> <input type="text"/>	<input type="text"/> <input type="text"/> <input type="text"/>
Signature	<input type="text"/>	<input type="text"/>
Date (dd/mm/yyyy)	<input type="text"/> <input type="text"/> <input type="text"/>	<input type="text"/> <input type="text"/> <input type="text"/>

Important notes

- Trusts:** If the plan is subject to a trust, this form must be completed and signed by all the trustees. If any changes have occurred relating to the trustees of the trust, certified copies of any deeds of appointment, retirement etc should accompany this request if they have not been previously supplied. Please note that signature verification of all new trustees will be required.
- Regular withdrawals:** If you are currently receiving withdrawals from your plan and wish to revise your instructions, please complete a regular withdrawal request form and attach it to this maturity form.
- Change of details:** Please notify us of any change of name or correspondence address. Please note that under Isle of Man money laundering legislation, we are obliged to ensure that our records hold appropriate documentary evidence to verify the identity and address of our policyholders.
- Powers of attorney:** Instructions will be accepted from individuals who hold a power of attorney. However, payment will only be made to the policy owner(s).
- Guaranteed Growth Fund (GGF):** If units are switched from a Guaranteed Growth Fund investment, a claims bonus dividend or a surrender bonus dividend may be added. If units are switched from a Guaranteed Growth Fund on any date before the end of the Guaranteed Growth Fund investment term, a terminal bonus or a market value adjuster may be applied. If you switch to Guaranteed Growth Fund 7, please note that the annual management charge on Guaranteed Growth Fund 7 is higher than the Guaranteed Growth Fund series you are currently invested in.
- Unit price:** Units will be valued at the unit price on the next business day following receipt of the signed surrender form and all relevant supplementary documents, by RL360 Life Insurance Company Limited, at the address stated below.
- Assigned bond:** For switches on an assigned bond, we will require the assignee's signature(s) and where the assignee is a corporate body (eg a bank), an up-to-date authorised signatory list must be provided.
- Bond held in corporate name:** For switches on a bond where the owner is a corporate body (eg company or bank), an up-to-date authorised signatory list must be provided.

Once completed please return the original of this form to:

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