

Switch form

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

Policy number	<input type="text"/>
Policyholder	<input type="text"/>
Daytime phone number	<input type="text"/>

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.

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.
4. We will process the switch instructions on the same day if received before 11am (UK time).

Please return the completed form to:

RL360° Services, International House, Cooil Road, Douglas, Isle of Man, IM2 2SP, British Isles or fax on +44 (0)1624 625900.

Switch instructions

Switch type (please tick one box only)

Redirection of future premiums only

Switch of existing units only

Switch of existing units plus redirection future premiums

Switch out

IMPORTANT: Please remember that we only need to know the % of UNITS you want to switch out of each fund. If it is your intention to completely switch out of a fund then you must insert 100% in the “% of units” box.

	ISIN/fund number	Please state name of fund(s) to be switched	Currency	% of units
1.				
2.				
3.				
4.				
5.				
6.				
7.				
8.				
9.				
10.				

Switch in

Proceeds of fund(s) being switched out to be split as follows:

	ISIN/fund number	Please state name of fund(s) to be switched into	Currency	% of proceeds
1.				
2.				
3.				
4.				
5.				
6.				
7.				
8.				
9.				
10.				
				Total 100%

- If you are switching into 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 ISIN/fund number and fund name.

If you want to sell units from a Offshore With-Profits or 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.

Redirection of future premium

Will future premiums be invested as per the instructions provided in the "Switch in" table? Yes No

If you select No, please provide alternative instructions in the table below.

	ISIN/fund number	State name of the fund(s) to be switched	Currency	% of new fund
1.				
2.				
3.				
4.				
5.				
6.				
7.				
8.				
9.				
10.				
				Total 100%

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)

Privacy and cookie policies

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