

Switch Instruction Form

Please complete this form using **BLOCK CAPITALS**

STEP 1 – POLICY DETAILS

Policy Number

Contract Type

STEP 2(a) – OWNERS OF THE POLICY

Owner 1

Title (Please tick) Mr Mrs Ms Other (in full)

Surname

Forename(s) (in full)

Address

(for correspondence)

Owner 2 (if any)

Title (Please tick) Mr Mrs Ms Other (in full)

Surname

Forename(s) (in full)

Address

(for correspondence)

STEP 2(b) – OWNERS OF THE POLICY – TRUSTEE / CORPORATE INVESTORS ONLY

Name of Trust / Corporate Body

Address (for correspondence)

Please complete the details below for all of the Trustees / Authorised Signatories who are authorised to give instructions relating to this policy

Name of Trustee /
 Authorised Signatory 1

Name of Trustee /
 Authorised Signatory 2 (if any)

Name of Trustee /
 Authorised Signatory 3 (if any)

If there is an additional trustee / authorised signatory of the bond, please copy Step 2(b), complete the corresponding details for the additional trustee / authorised signatory and attach the completed page to this Switch Instruction Form.

STEP 3 – CHANGING HOW YOUR POLICY IS INVESTED

Please indicate the type of change you want to make by ticking one box below.

Option	✓	
(a) Switch existing investments only (single premium investments)	<input type="checkbox"/>	Complete Sections 4 & 5
(b) Switch existing investments, AND Redirect future investments only (regular premium investments)	<input type="checkbox"/>	Complete Sections 4 & 5

The fund switch will be processed:

(a) Using the unit price of the date of receipt of your written request:

OR

(b) At a Later date (please specify) (dd/mm/yyyy)

Notes:

1. Switch instructions will normally be carried out on the date as specified in Step 3 using the prices available on that date
2. We will normally allow 4 free switches per year for Life policies and 12 per year for pension policies between Phoenix funds. Thereafter fund switches will be subject to a charge.
3. Charges vary from fund to fund. If you decide to switch funds, the ongoing charges incurred by your policy may change. For details of the charges that apply to each fund please contact us.
4. Phoenix Ireland recommends that you seek independent advice from your broker before switching to an alternative fund.

STEP 4 – SWITCHING EXISTING INVESTMENTS

The table below should be completed if you want to change where your existing money is invested. Please show how you would like the switch money to be invested, showing the percentage (%) to be invested in each new fund.

Existing fund name	Proportion of investment to be switched (%)	New fund name	New fund selection of investment switched (%)
Total			100%

N.B. The new fund selection must add up to 100%. If it does not add up to 100% we will not be able to action the switch and will need to contact you for further instructions.

STEP 5: DECLARATION

- I declare that I have the authority to give instructions in respect of the above numbered policy.
- I instruct Phoenix Ireland to carry out the switch in accordance with the details above.

Signature of the Owner / Authorised Signatory 1	X	Date	<input type="text"/>
Signature of the Owner / Authorised Signatory 2	X	Date	<input type="text"/>
Signature of the Owner / Authorised Signatory 3	X	Date	<input type="text"/>

Phoenix Ireland is the trading name used by Scottish Mutual International Limited and Phoenix Life Limited. Scottish Mutual International Limited is authorised and regulated by the Central Bank of Ireland and is registered in Ireland (Company No. 242244). The company's registered office is 25-28 North Wall Quay Dublin 1, Ireland. An up-to-date list of its directors, containing the particulars required by paragraphs (a), (b) and (c) of section 196(1) of the Companies Act 1963, is available upon request from the company's registered office.

Phoenix Life Limited is authorised and regulated in the United Kingdom by the Financial Services Authority. Phoenix Life Limited is incorporated in England (Company No. 1016269) and has a registered branch in Ireland (Branch No. 906073). The company's registered office is 1 Wythall Green Way, Wythall, Birmingham B47 6WG United Kingdom. Its directors are A B Davidson (UK), J P Evans (UK), M J Merrick (UK), A Moss (UK), M D Ross (UK), J C Park (UK), W R Treen (UK), M N Urmston (UK) and J Yates (UK).
(UK). **PL_SWITCH/0910**