PHOENIX WEALTH

INVESTMENT BOND

SWITCH FORM

Phoenix Wealth, Unit Linked Life & Pensions, PO Box 1393, Peterborough, PE2 2TP.

What is this form for?

You can use this form to switch between funds in your Investment Bond.

If you are currently taking regular withdrawals, switching funds could alter your withdrawals. You may wish to discuss this with your financial adviser.

Switching funds will also stop any Portfolio Rebalancing or Drip-feeding you currently have in place and you will need to reapply for one of these options.

Definitions

Bond and **Policy** – The Investment Bond can be split into a number of policies, which are treated as separate policies within their own right. When we use the word 'Bond' we are referring to the policies collectively and when we use the term 'Policy' we are referring to each individual policy that makes up your Bond.

1. BOND NUMBER

☐☐☐☐☐☐

2. SWITCHING INSTRUCTIONS

Complete this section to confirm the switches you want to make.

Switch date ☐☐ / ☐☐ / ☐☐☐☐

The **Fund Dealing Guide** has more information about the 'unit price date' if we do not receive this form in time.
Please confirm if you want to:

☐ **Option 1:** Switch 100% of your existing fund. Go straight to table B

☐ **Option 2:** Want to make the same switch across all Policies that make up your Bond. Complete table A and B

☐ **Option 3:** Want to switch funds in different Policies that make up your Bond. Complete table A and B

TABLE A – FUNDS TO SWITCH FROM

You must enter either the **amount** (£) or **proportion** (%) but not both.

Any funds you don't list in Table A will stay invested according to your most recent instructions. If the amount you specify for any fund is more than the actual value, we will switch the whole of that fund.

Fund name	**Amount** (£)	**Proportion** (whole % only)	**If you ticked option 3 which Policy numbers does the switch apply to?**
		%	
		%	
		%	
		%	
		%	
		%	
		%	
		%	
		%	
		%	
TOTAL			

TABLE B – FUNDS TO SWITCH TO

Please tell us the funds you want to switch to. You must enter either the **amount** (£) or **proportion** (%) but not both.

Fund name	**Amount** (£)	**Proportion** (whole % only)	**If you ticked option 3 which Policy numbers does the switch apply to?**
		%	
		%	
		%	
		%	
		%	
		%	
		%	
		%	
		%	
		%	
TOTAL			

The 'Amount (£)' column can only be used if the '£' column is completed in Table A and must equal the total in Table A.

3. SIGNATURES

This form must be signed by all owners/trustees or a financial adviser that has been given written authority, that we have received, by all owners/trustees. If you need more space, please use a photocopy of this page and attach to this form.

Financial adviser (if signing on behalf of client(s)):

Signature:

✖

Date:

☐☐ / ☐☐ / ☐☐☐☐

Owner/trustee

Name 1	Signature ✖	Date ☐☐/☐☐/☐☐☐☐
Name 2	Signature ✖	Date ☐☐/☐☐/☐☐☐☐
Name 3	Signature ✖	Date ☐☐/☐☐/☐☐☐☐
Name 4	Signature ✖	Date ☐☐/☐☐/☐☐☐☐

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