

SWITCHING EXISTING INVESTMENTS

Equity Funds					Fixed Interest Funds		Managed Funds		Deposit Funds	
UK Equity 812	International Equity 822	American Equity 825	Asia Pacific Equity 824	European Equity 826	Sterling Fixed Interest 813	Global Fixed Interest 823	Balanced Managed UK 820	Balanced Managed 821	Sterling Deposit 815	Dollar Deposit 827

Please specify, in whole percentages, the percentage you wish to switch out of a fund.

TO:

Equity Funds					Fixed Interest Funds		Managed Funds		Deposit Funds	
UK Equity 812	International Equity 822	American Equity 825	Asia Pacific Equity 824	European Equity 826	Sterling Fixed Interest 813	Global Fixed Interest 823	Balanced Managed UK 820	Balanced Managed 821	Sterling Deposit 815	Dollar Deposit 827

Please specify, in whole percentages, the new holding required, totaling 100%

REDIRECTION OF FUTURE CONTRIBUTIONS:

Equity Funds					Fixed Interest Funds		Managed Funds		Deposit Funds	
UK Equity 812	International Equity 822	American Equity 825	Asia Pacific Equity 824	European Equity 826	Sterling Fixed Interest 813	Global Fixed Interest 823	Balanced Managed UK 820	Balanced Managed 821	Sterling Deposit 815	Dollar Deposit 827

Please specify, in whole percentages, where future contributions are to be invested, totaling 100%.

Policyholder(s)	
Policy number	

Please tick this box if any individual connected to the Policy (including any appointed Adviser, Policyholder/Trustee or family member/close associate of the same) is party to inside knowledge and privileged trading information in relation to the security/ies as listed above.

Policyholder 1

Policyholder 2

x	x
---	---

D	D	M	M	Y	Y	Y	Y
---	---	---	---	---	---	---	---

Please forward your completed Switch Form by email to ask@monument.im

A valid switch request received before 9.30am will be processed the same day. A switch request after this time will be processed the following working day.