

GEN31 V14 0823

Important notes

Use this form to switch the funds you're already invested in (Part 2). You can also specify the funds that you wish future regular premiums to invest in (Part 3).

To see what funds are available and their annual management charge, please read the latest fund range leaflet or investment options guide for your policy type, available on standardlife.ie/fundrange

For sustainability-related disclosures, please see the Responsible Investment funds section on standardlife.ie/funds and standardlife.ie/sfdr

In exceptional circumstances, if we have to delay switching, we'll use the fund prices on the day the transaction takes place – these prices could be very different from the prices on the day you made the request. For up to date fund restrictions, see Products and funds trading (PTR) on standardlife.ie/fundrange

Investment choices are made at your own risk, so it's important to get the appropriate financial advice.

If you are getting advice from a financial adviser, you should remember that they are acting on your behalf, not only by giving advice, but also regarding the completion of this form.

Data Protection

We're committed to maintaining the trust and confidence of our customers. Our Privacy Policy explains how we use our customers' personal information. It explains when and why we collect personal information about our customers, how we use it, the conditions under which we share it with others and how we keep it secure. It also explains how you can obtain details of the information we hold about you, and the choices you have about how we use that information. You can get a copy of our Privacy Policy on our website: standardlife.ie/privacy

Part 1 – Details of policy to be changed

Policy number	<input type="text"/>
Policy owner 1	<input type="text"/>
Policy owner 2	<input type="text"/>

Do not include letters at the end of your policy number, unless you have a multiple policy facility and you wish to create separate groups, which attract separate charges.

Part 2 – Existing funds

I want to **sell**:

Fund name (see your last policy statement)	% to be sold
	%
	%
	%
	%
	%

For example, if you want to sell half of your Managed fund units: insert 'Managed fund' and '50%'. If you want to switch an equal percentage of all your funds, just write that percentage in the 'to be sold' box.

A charge may be applied when you switch units a number of times in any 12 month period. This charge does not apply to PRSAs, where the number of switches may be restricted instead.

And with the proceeds of those units, I want to **buy** units in:

Fund name (see fund/investment options guide for your policy type on www.standardlife.ie/fundrange)	% to be bought
	%
	%
	%
	%
	%
Please ensure that your percentage adds up to 100%	Total 100%

Part 3 – Future regular premiums

I want the investment content of my future premiums to buy units in:

Fund name (see fund/investment options guide for your policy type on standardlife.ie/fundrange)	%
	%
	%
	%
	%
Please ensure that your percentage adds up to 100%	Total 100%

Part 4 – Your contact details

Policy owner 1 email

@

Mobile phone number Home phone number

Policy owner 2 email

@

Mobile phone number Home phone number

We would like to contact you from time to time to keep you up to date with products and services, company news and other promotions. If you want us to keep you up to date, please choose how you'd prefer us to contact you:

Policy owner 1 Email Phone Post Text

Policy owner 2 Email Phone Post Text

We may use your email to help manage your policy. If you don't want us to use it, leave it blank.

You can update your consent and preference at any time, just let us know.

Tick all that apply

Authorisation

I instruct Standard Life to make the changes as set out in this form.

Policy owners' signatures (all policy owners must sign)

Date (DD/MM/YYYY) if applicable, for and on behalf of



Signature
If under trust: all trustees must sign. If assigned to a lender: lender must also sign. If an occupational pension scheme: the trustees must sign. If Lane Clark & Peacock Trustee Services are the trustees of your Synergy Executive Pension: the member can sign.

What happens next?

Send this completed instruction to Customer Service Division, Standard Life, 90 St Stephen's Green, Dublin, D02 F653.

We will carry out your instructions as soon as possible. Normally, this means:

- If Standard Life receives the switch request before the cut-off time, the switch will be processed using the prices that apply 2 working days after receipt (for example, if received at 10am on Tuesday, the switch will be processed using Thursday's prices).
- If the request is received after the cut-off time, the switch will be processed using the prices that apply 3 working days after receipt (for example, if received at 5.30pm on Tuesday, the switch will be processed using Friday's prices).
- The cut-off time for Synergy policies is 3pm. The cut-off time for all other policies is 5pm.

We will send you confirmation when your instruction has been carried out.

A financial adviser may only sign if they have been given authority by policy owners..

Prices are normally, but not necessarily, declared each working day.

A bank public holiday where our office is closed will add an extra day to the time line when applying prices to your instruction. Our office is closed on all bank and public holidays in the Republic of Ireland.

(01) 639 7000 standardlife.ie customerservice@standardlife.ie

Standard Life International dac is regulated by the Central Bank of Ireland. Standard Life International dac is a designated activity company limited by shares and registered in Dublin, Ireland (408507) at 90 St Stephen's Green, Dublin D02 F653.

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Calls may be monitored and/or recorded to protect both you and us and help with our training. Call charges will vary.