

GEN31 V12 0520

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 www.standardlife.ie

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 www.standardlife.ie

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.

Privacy notice

We collect, process and maintain policyholder personal information and apply safeguards to ensure that it is protected and used in accordance with data protection law. To read our Privacy Policy, visit www.standardlife.ie/privacy

Part 1 - Details of policy to be changed

Policy number	<input type="text"/>
Policyowner 1	<input type="text"/>
Policyowner 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
<input type="text"/>	<input style="width: 50px;" type="text" value="%"/>
<input type="text"/>	<input style="width: 50px;" type="text" value="%"/>
<input type="text"/>	<input style="width: 50px;" type="text" value="%"/>
<input type="text"/>	<input style="width: 50px;" type="text" value="%"/>
<input type="text"/>	<input style="width: 50px;" type="text" value="%"/>

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.

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

Fund name (see fund range leaflet or investment options guide for your policy type)	% to be bought
<input type="text"/>	<input style="width: 50px;" type="text" value="%"/>
<input type="text"/>	<input style="width: 50px;" type="text" value="%"/>
<input type="text"/>	<input style="width: 50px;" type="text" value="%"/>
<input type="text"/>	<input style="width: 50px;" type="text" value="%"/>
<input type="text"/>	<input style="width: 50px;" type="text" value="%"/>
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 range leaflet or investment options guide for your policy type)	%
	%
	%
	%
	%
Please ensure that your percentage adds up to 100%	Total 100%

Part 4 - Your contact details

Policyowner 1 email

@

Mobile phone number Home phone number

Policyowner 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:

Policyowner 1 Email Phone Post Text

Policyowner 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.

Policyowner signatures (all policyowners 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 Limited are trustees of your Synergy Executive Pension the member can sign.

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

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

What happens next?

Send this completed instruction to Customer Service Division, Standard Life, 90 St Stephen's Green, Dublin 2.

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.

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

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