

**GEN31 V09 0517**

## 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](http://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](http://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.

### Your data is protected

We collect, process and maintain policyholder personal data and apply safeguards to ensure that it is protected and is used in accordance with the Data Protection Acts. To see our data protection notice, visit [www.standardlife.ie/dataprotection](http://www.standardlife.ie/dataprotection)

## 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="%"/>
<b>Please ensure that your percentage adds up to 100%</b>	<b>Total 100%</b>

