

Switch and redirection form

Additional fund selection form

This form should only be used if you have a Vista/InvestPlus policy issued after January 2005 or a Futura/Lifelong, Global Choice, International Wealth Account, International Wealth Account flexible contribution plan, Wealth Accumulation Plan or a SavingsPlus policy.

This form should only be completed where you wish to switch or redirect more than ten funds.

Before completing this form please refer to the 'Switch and redirection help guide'. Please complete this form in **CAPITAL** letters. Any unclear instruction will not be performed. A list of funds and their currencies is available on www.zurichinternational.com.

Please note that no switches or redirections can be made where the policy owner(s) is/are resident in the United States or any United States federally controlled territory.

Please email this form to switch_helppoint@zurich.com or return it to us by post. This email address is for switch forms only and queries by email to this address will not be reviewed. If you do have any queries please contact client.services@zurich.com

1. Policy details

I/We authorise you to change the fund holding of the following policy, as shown below:

Policy number

2. Switch present fund holding to new fund holding

Sell from present fund holding/Switch from:		Buy into new fund holding/Switch to:			
Five character fund code	%	Five character fund code	%		

Please click to automatically calculate the total Total

3. Redirect future payments

Invest future payments into:					
Five character fund code	%				

Please click to automatically calculate the total Total

4. Authorised signatory/signatories details

(Please ensure that instructions for joint policies are signed by both parties)

Signature of policy owner 1	Signature of policy owner 2
Print name	Print name
Email address	Email address
Date	Date
FIA name	
Job title	
Financial professional	

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