

Zurich Self Invested Personal Pension (Zurich SIPP)

Zurich Protected Rights Transfer Plan

Flexible Drawdown Plan (Non Protected Rights)

Flexible Drawdown Plan (Protected Rights)

Adviser authority

Plan number

You have entered into an agreement with Zurich Assurance Ltd (Zurich) and Capita Life & Pensions Regulated Services Limited (Capita) the Scheme Administrator and Operator, but the terms and conditions do not fully cover the giving of instructions or communicating with Zurich and Capita including instructions or communications given electronically. Completing this document and sending it to Zurich Retirement Services, 3 Temple Quay, Bristol, BS1 6DZ will allow this.

You must sign this authority to confirm acceptance of its terms. By signing this authority you authorise Zurich and/or Capita to accept instructions (by post, fax, email or electronically) which are sent by the Adviser Firm detailed below in respect of the following transactions, remembering documentation requiring a customer sign-off will need to be completed and accompany your instructions:

- Change of selected retirement age or annuity purchase age.
- Switches between Zurich pension funds.
- Redirection of regular payments made to Zurich pension funds (Zurich SIPP only).
- Investment changes to wider SIPP assets.
- Switches between Zurich pension funds and wider SIPP assets.
- Add, amend or remove regular income drawdown payments.
- One off income drawdown payments.
- Change of bank payment details.

This agreement is not transferable to another Adviser Firm, but can be withdrawn at any time, by writing to Capita at the address above.

Please note Zurich and/or Capita

- accept no liability for the late submission of instructions by the Adviser Firm or for any errors or omissions in any of the information given by the Adviser Firm when instructions are submitted,
- may refuse to carry out any instruction if in their opinion the instruction is incomplete or unclear,
- will process instructions when they are deemed received by Zurich or Capita under the terms and conditions. Instructions must be clear for them to be deemed received.

Please note Capita

- will process instructions concerning investment changes and drawdown matters,
- will record instructions concerning Zurich pension fund switches. Capita will then forward these instructions to Zurich.

Zurich will switch funds within the timescales defined in the terms and conditions. These timescales depend on when the switch instruction is received by Zurich Retirement Services.

You confirm that this authority will continue to be effective until you give written notification of cancellation and Capita has received that notification at the above address.

Full Name

Signature

Date

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The Adviser Firm will act only after receiving instructions from you. The form of instructions from you to the Adviser Firm will be agreed between you.

The Adviser Firm agrees to send the instructions to Zurich and/or Capita on terms agreed with you and to ensure that, before it acts on the instructions, you have received the key features document as well as the terms and conditions and the 'Your choice of pension funds' brochure which include details of the current charges that may apply to Zurich pension funds. It will also ensure that if you hold wider SIPP assets, you have received 'A guide to wider SIPP charges' and, if you have selected income drawdown, you have received 'A guide to income drawdown charges'.

The Adviser Firm agrees to exercise this authority only in accordance with the permissions and authority granted to the Adviser Firm under the Financial Services and Markets Act 2000 or any replacement legislation and will be obliged to comply with such legislation.

Adviser Firm name

<div>Adviser signature (on behalf of the Adviser Firm)</div>	Date	<div>DDMMYYYY</div>
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Adviser name

Financial Services Register number

Adviser Firm address

Postcode

Capita Life & Pensions Regulated Services Limited is authorised and regulated by the Financial Conduct Authority. Registered in England No. 2424853.
Registered Office: First Floor, 2 Kingdom Street, Paddington, London, W2 6BD.

Zurich Assurance Ltd, authorised by the Prudential Regulation Authority and regulated by the Financial Conduct Authority and the Prudential Regulation Authority.
Registered in England and Wales under company number 02456671.
Registered Office: Unity Place, 1 Carfax Close, Swindon, SN1 1AP.
Telephone: 0345 850 8898

We may record or monitor calls to improve our service.

