

# Zurich Trustee Investment Plan

## (Plans start on or after 1 July 2007)

### Adviser authority

Existing Plan number:

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The authority is for this Zurich Trustee Investment Plan only. The Trustee(s) has/have entered into an agreement for a Zurich Trustee Investment Plan with Zurich Assurance Ltd (Zurich), but the terms and conditions do not cover the giving of instructions or communicating with Zurich electronically. Completing this document and sending it to Zurich at PO BOX 809, Bishops Cleeve, Cheltenham, Gloucestershire, GL52 8YR will allow this.

If there is more than one Trustee, all Trustees must sign this authority to confirm acceptance of its terms and to confirm that they are able to give this authority under the terms of the applicable scheme.

By signing this authority the Trustee(s) authorise Zurich to accept instructions relating to any of the following which are sent electronically by the Adviser Firm detailed below.

- Change existing Trustee contact details.
- Fund switches.
- Partial or full withdrawals.
- Add, amend or remove regular withdrawals.
- Change of bank payment details.

This authority is not transferable, but can be withdrawn at any time, by writing to Zurich at its head office, the address of which is: Zurich Assurance Ltd, Unity Place, 1 Carfax Close, Swindon, SN1 1AP.

#### Please note Zurich

- Accepts no liability for the late electronic submission of instructions by the Adviser Firm or for any errors or omissions in any of the information entered by the Adviser Firm when instructions are submitted electronically.
- May refuse to carry out any instruction if in its opinion the instruction is incomplete or unclear.
- Will process instructions when they are deemed received by Zurich under the terms of the electronic service. Instructions must be clear for them to be deemed received. Although this is not provided for in terms and conditions, instructions to switch funds can be provided electronically via our extranet. Funds can only be switched on a Business Day. If your instruction is received before 8.30 am\* on a Business Day, the switch will take place that day. If instruction is received after 8.30 am\* on a Business Day, the switch will take place on the next Business Day. \*We will notify you if this time changes. 'Business Day' is defined in the terms and conditions.

#### The Trustees

- Confirm that this authority will continue to be effective until the Trustee gives written notification of cancellation and Zurich has received that notification at its Head Office.
- Confirm that the Adviser Firm has been appointed as an agent in accordance with the express terms of the trust deed or under the provisions of the Trustee Act 2000 or Isle of Man Trustee Act 2001 as appropriate.
- Agree to notify Zurich of any change in trustees.
- Agree to indemnify Zurich for any losses, expenses, claims, costs or demands it may suffer as a result of appointment of the Adviser Firm as agent not being in accordance with the express terms of the trust or the provisions of the Trustee Act 2000 or Isle of Man Trustee Act 2001 or failure to notify Zurich of any change in trustees.
- Confirm and warrant that all investment decisions of the pension scheme in relation to the plan (and all instructions provided to Zurich in relation to the Plan and under this Authority) will be in accordance with the requirements of the trust deed and rules of the pension scheme and overriding pensions legislation.

First Trustee name:

First Trustee signature

Date

D	D	M	M	Y	Y	Y	Y
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Second Trustee name:

Second Trustee signature

Date

D	D	M	M	Y	Y	Y	Y
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Third Trustee name:

Third Trustee signature

Date

D	D	M	M	Y	Y	Y	Y
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Fourth Trustee name:

Fourth Trustee signature

Date

D	D	M	M	Y	Y	Y	Y
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#### The Adviser Firm

- Will act only after receiving instructions from a Trustee who is legally entitled to give such instructions under the terms and conditions applicable to the Zurich Trustee Investment Plan. The form of instructions from the Trustee to the Adviser Firm will be agreed between them. A valid switch instruction must convey the agreed decisions of all trustees or, provided that the trust deed permits, all decisions of all of the trustees.
- Agrees to send the instructions electronically to Zurich on terms agreed with the Trustee and to ensure that, before it acts on the instructions, the Trustee has 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.
- 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 liable for complying with such legislation.

First Trustee name:

Financial Services Register number:

Adviser name:

Adviser Firm address:

Postcode:

Adviser signature (on behalf of the Adviser Firm)

Date

D	D	M	M	Y	Y	Y	Y
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Zurich Assurance Ltd

Registered in England and Wales under company number 02456671.

Registered Office: Unity Place, 1 Carfax Close, Swindon, SN1 1AP.

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