Zurich Self Invested Personal Pension (SIPP)
Zurich Protected Rights Transfer Plan
Flexible Drawdown Plan (Non Protected Rights)
– for plans set up after 2 April 2007



for plans set up after 2 April 2007
 Flexible Drawdown Plan (Protected Rights)

- for plans set up after 2 April 2007

Zurich pension fund switch form

Please complete this form to tell us about any changes you would like to make to your Zurich pension fund investments for the above plans. Please complete this form in BLOCK CAPITALS in blue or black ink and return it to: Zurich Retirement Services, PO Box 809, The Grange, Bishops Cleeve, Cheltenham, Gloucestershire, GL52 8YR, UK.

Please do not use this form for providing	g instructions for Wider SIPP Assets or for encashment of fur	nds within your Zurich Trustee Investment Plan.
Please contact your adviser or us for the	e correct documentation.	
1 Personal details		
Plan number		
First name(s)		
Surname		
Title Mr Mrs Miss	Ms Dr Other (please specify)	
Permanent residential address		
	Postcode	
Country (if not within the UK)		
complete sections 2(A) and 2(B). Please ask your adviser for a copy of the (A) Switching existing Zurich pensions.	to change both your existing investment and your fut the 'Your choice of funds' brochure for details of the Zurich sion fund units nits already allocated to your plan. Please specify the fund	pension funds currently available.
You must make your choice in whole pe of your single payments and transfer pay payments and your protected rights tran	rcentages adding up to 100%. You can use a maximum of 21/ rments. Similarly, you can use a maximum of 20 funds at any sfer payments.	0 funds at any one time in respect of the total one time in respect of each of your regular
Existing Zurich pension fund	% of existing Zurich pension fund to be switched	New Zurich pension fund

Zurich pension fund selection (continued)

(B) Redirecting future regular payments (Zurich SIPP only)

This instruction applies only to the allocation of your future payments. If you do not complete this instruction, we will continue to allocate your payments to the same Zurich pension funds as before.

You must make your choice in whole percentages adding up to 100%. You can use a maximum of 20 funds at any one time.

Zurich pension fund %

Please see the terms and conditions for details of when Zurich pension fund units are bought and sold.

This request must be signed by you.

Planholder's signature

Please let us know if you would like a copy of this in large print or braille, or audio.

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Telephone: 0345 850 8898

We may record or monitor calls to improve our service.

