

# Zurich Trustee Investment Plan

## Fund Switch/redirection form

Please complete this form to tell us about any changes you would like to make to the fund investments in the Zurich Trustee Investment Plan (the plan). 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.

### 1. Scheme details

Name of Scheme

Existing plan number

### 2. Fund selection

Please ask your adviser for a copy of 'Your choice of funds' for details of the funds currently available.

#### (A) Switching existing units

This instruction applies only to those units already allocated to the plan. Please specify the fund(s) to be switched and the new fund(s) selected and the relevant proportions for each.

You must make your choice for each fund switched in whole percentages adding up to 100%.

Existing fund to be switched	% of existing fund	New fund(s) after switch	%

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

2. Fund selection (continued)

(B) Redirecting future regular payments

This instruction applies only to the allocation of future payments. If you do not complete this instruction, we will continue to allocate payments to the same funds as before. Show below how total regular payments are to be invested in the future.

You must make your choice in whole percentages adding up to 100%.

Fund	%

Please see the terms and conditions for details of when units are bought and sold.  
This request must be signed by the trustee authorised to sign and act on behalf of all trustees.

Trustee name (in full)

Trustee signature

Date

D

D

M

M

Y

Y

Y

Y

Corporate trustee

The person or persons signing on behalf of the corporate trustee confirm that he/she/they have appropriate authority to sign.

Signed on behalf of the corporate trustee by

Authorised signatory

Name in BLOCK CAPITALS

Date

D

D

M

M

Y

Y

Y

Y

Authorised signatory

Name in BLOCK CAPITALS

Date

D

D

M

M

Y

Y

Y

Y

Please let Zurich know if you would like a copy of this in large print or Braille,  
or on audiotape or CD.

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