

CHANGE OF FUND REQUEST

Policy number	
Policyholder(s)	

Please complete the boxes below with the name of the fund you wish to switch your investment from and to, indicating the proportion of your investment you wish to be allocated to each fund. It is essential that you complete all relevant sections of the form, if the form isn't fully completed we won't be able to complete the fund switch.

There is normally one free fund switch a year, for any further switches there may be a charge. This depends on the terms and conditions of your policy, please contact us if you have completed a fund switch in the last 12 months and we will confirm if there will be charge for this fund switch.

Fund switch details:

FUNDS YOU WISH TO SWITCH FROM		FUNDS YOU WISH TO SWITCH TO	
Existing fund name	Enter % amount to be switched out	New fund name	Enter % amount to be switched in

Allocation of future premiums:

If you would like to change the investment fund(s) for future premiums, please complete the below indicating the proportion of your premium you wish to be allocated to each fund.

New fund name	Enter % of premium to be allocated

Total

- All policy holders (including any assignees) must sign below.
- If the policy is written in trust, then, unless one trustee is allowed to sign alone, all trustees must sign the form.
- I/We have not received any advice from any employee or representative of Countrywide Assured about this instruction.
- All fund switches will be completed in accordance with the applicable terms and conditions of your policy.
- Future premiums will continue to be allocated to your existing fund(s) if the “Allocation of future premiums” section is not completed.

Signature(s):

Name:	Signature:	Date:
Name:	Signature:	Date:
Name:	Signature:	Date:
Name:	Signature:	Date:

It's important to include your signature as proof of your request because protecting our customers from potential fraud is something we take very seriously.

There are three possible ways to add your signature.

Option 1 – Got a printer?

Add your signature to your printed form(s). You can either scan or take a photo of your paperwork.

Option 2 – No printer?

Complete your form(s) online and scan or photo of a handwritten letter asking us to accept your form(s).

Please make sure your signature appears clearly on your handwritten letter.

Option 3 – Add an electronic signature to your form(s)

If you can add your signature to your form(s) using a digital pen on the screen, find the Adobe PDF Fill & Sign' feature to draw and add your signature.