

Portal

Switch instruction form

Where we refer to Countrywide Assured plc ("Countrywide Assured") in this document, this includes CASFS Ltd ("CASFS") where appropriate.

Client name

Account/Policy number

For your investment choice, please complete section 1 **or** 2. You can either use the Model Portfolio Service or the Select Fund Service but not both.

1. Complete this section to use the Model Portfolio Service

Complete one box only

New Model Choice

Name - 100%

atomos Active

atomos Index

atomos SRI

Please note: we will sell all your existing holdings and invest fully into the new model and all future payments will be allocated to your new model choice.

2. Complete this section to use the Select Fund Service

Enter the percentage you would like to invest in each box. The total percentage must add up to 100%.

Asset Name

Please note: we will sell all your existing holdings and invest fully into the new fund(s) and all future payments will be invested to reflect your new fund choice.

Note: If your switch request relates to any of the funds within the Select Fund Service range, you should ensure you have received the most up to date Key Investor Information Documents (KIID) in respect of your chosen funds where available. The KIID is produced by the fund manager and where available can be obtained from our website (www.countrywideassured.co.uk).

Section 3. Written authorisation

1. All account/policy holders (including any assignees) must sign below.
2. If the policy is written in trust, then, unless one trustee is allowed to sign alone, all trustees must sign the form.
3. The trustee(s) must state his/her (their) capacity. Two directors must sign, if the trustee is a company.
4. The account/policy holder must sign for all Portal Pensions.
5. I/We have not received any advice from any employee or representative of Countrywide Assured about this instruction.

Signature Date

Capacity of signatory

Signature Date

Capacity of signatory

Signature Date

Capacity of signatory

Thank you for completing this form. Our customer services team will contact you shortly to confirm your instructions to us have been carried out.