

Group switch and redirection form

Once this form has been completed, please insert a scanned signature and email along with the 'Group switch excel template' to groupswitch_helppoint@zurich.com (we recommend you send this from a TLS domain). Any partial or incorrect instructions will not be carried out and may result in processing delays, which could miss the switch cut-off time of 10am UK time.

1. All fields must be completed

Date

Group switch ID

Fund investment adviser group name

Fund investment adviser group code

Number of policies in the 'Group switch excel template'

Do

- Contact your usual Zurich representative if you don't know your fund investment adviser group code.
- Refer to the group switch and redirection help guide before completing this form.
- Make sure that your spreadsheet and this form share the same name.
- Send from a secure TLS domain and only send to 'groupswitch_helppoint@zurich.com'.

Don't

- Send any additional instructions on your group switch email, or more than one group switch instruction in the same email.
- Add anything more than policy numbers in your spreadsheet.
- Use colours, shading or anything other than numeric characters in the spreadsheet.
- Include any text on this form other than the information required.

4. Insert a scan of the fund investment adviser signature here

Name of fund investment adviser who's scanned signature has been inserted

Email address for the receipt of this instruction. Please do not leave the email address blank as we will use the email address that you provide to send the acknowledgement and switch acceptance report email notification.

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