

# Group switch and redirection form

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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](mailto: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

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Fund investment adviser group code

Number of policies in the 'Group switch excel template'

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**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

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**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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