

Switch and redirection form

You can switch, redirect your investment strategy and manage your policy online. Log in now or create your account on online.zurichinternationalsolutions.com.

Before completing this form please refer to the 'Switch and redirection help guide'. Please complete this form by typing in **CAPITAL** letters. Any unclear instruction will not be performed. A list of funds and their currencies is available on www.zurichinternational.com. Please note that no switches or redirections can be made where the policy owner(s) is/are resident in the United States including any United States federally controlled territory.

Switch only: complete sections 1, 2 and 5. Redirect only: complete sections 1, 3 and 5. Switch and redirect: complete sections 1, 2, 3 and 5. Retirement investment strategy (RIS)/Automatic investment strategy (AIS): complete sections 1, 4 and 5.

Please email this form to switch_helppoint@zurich.com or return it to us by post. This email address is for switch forms only and queries by email to this address will not be reviewed. For any queries, please contact your regional Zurich HelpPoint using the contact information given on www.zurichinternational.com.

1. Policy details

I/We authorise you to change the fund holding of the following policy, as shown below:

Policy number											
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2. Switch present fund holding to new fund holding

Sell from present fund holding/Switch from:					Buy into new fund holding/Switch to:				
Five character fund code					Five character fund code				
				%					%
				%					%
				%					%
				%					%
				%					%
				%					%
				%					%
				%					%
				%					%
				%					%
				%					%

Please click to automatically calculate the total **Total**

3. Redirect future payments

Invest future payments into:				
Five character fund code				
				%
				%
				%
				%
				%
				%
				%
				%
				%
				%
				%
				%

Please click to automatically calculate the total **Total**

4. Investment strategies (Please select the required strategy and currency.)

I/We want my/our policy/policies to follow the:

Retirement investment strategy in GBP USD EUR

Automatic investment strategy in GBP USD EUR

5. Authorised signatory/signatories details

(Please ensure that instructions for joint policies are signed by both parties)

<input type="text" value="Signature of policy owner 1"/>	<input type="text" value="Signature of policy owner 2"/>
<input type="text" value="Print name"/>	<input type="text" value="Print name"/>
<input type="text" value="Email address"/>	<input type="text" value="Email address"/>
Date <input type="text" value="Day"/> <input type="text" value="Month"/> <input type="text" value="Year"/>	Date <input type="text" value="Day"/> <input type="text" value="Month"/> <input type="text" value="Year"/>
<input type="text" value="FIA name"/>	
<input type="text" value="Job title"/>	<input type="text" value="Relevant financial professional"/>