



ZURICH®

Switch and redirection form

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/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. If you do have any queries please contact client.services@zurich.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:

<input type="checkbox"/> Retirement investment strategy	in	<input type="checkbox"/> GBP	<input type="checkbox"/> USD	<input type="checkbox"/> EUR
<input type="checkbox"/> Automatic investment strategy	in	<input type="checkbox"/> GBP	<input type="checkbox"/> USD	<input type="checkbox"/> EUR

5. Authorised signatory/signatories details

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

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

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