

Instruction to change funds



Important notes

Use this form to change the funds you are already invested in (Part 2). You can also specify the funds that you wish future regular premiums to invest in (Part 3).

Please read the fund range leaflet/investment options guide for your policy type to see what funds are available to invest in. If you are switching from/to certain funds, e.g. a multi-manager fund, different annual charges may apply.

If you are receiving advice from a financial adviser, you should remember that they are acting on your behalf, not only by giving advice, but also regarding the completion of this form.

Part 1 Details of policy to be changed

Do NOT include letters at the end of your policy number, unless you have a multiple policy facility and you wish to create separate groups, which attract separate charges.

Policy number	
Policy owner's name	
Contact number (in case we need to clarify this instruction)	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>

Part 2 Existing funds

A charge may be applied when you switch units a number of times in any 12 month period.

In exceptional circumstances, a request may be deferred for up to one month, or one year for a property fund.

I want to **sell**:
For example, if you want to sell half of your managed fund units: insert 'managed fund' and '50%'. If you want to switch an equal percentage of all your funds, just write that percentage in the '% to be sold' box.

Fund name (see your last policy statement)	% to be sold
	%
	%
	%
	%
	%

And with the proceeds of those units, I want to **buy** units in:

Fund name (see fund range leaflet/investment options guide for your policy type)	% to be bought
	%
	%
	%
	%
	%
Please ensure that your percentage adds up to 100%	Total 100%

Part 3 Future regular premiums (if applicable)

I want the investment content of my future premiums to buy units in:

Fund name (see fund range leaflet/investment options guide for your policy type)	%
	%
	%
	%
	%
	%
Please ensure that your percentage adds up to 100%	Total 100%

Data Protection Notice

Personal data and information provided in connection with your instruction will be used by Standard Life to process your instruction. We will keep your personal data confidential, and will not disclose it to any third party unless it is lawful to do so or required by law to be disclosed.

If you have appointed a Financial Adviser, we will give them information about your policy and, where appropriate, send copies of correspondence to them to enable them to give you advice. You should be aware that your Financial Adviser may retain and use your personal data in accordance with their data protection notice.

You have the right to request a copy of the personal data we hold about you and the right to rectify that personal data by writing to Standard Life's Data Protection Coordinator. We may charge a fee for providing this information.

If under trust: all trustees must sign. If assigned to a lender: lender must also sign. If an occupational pension scheme: the trustees must sign.

A Financial Adviser may only sign if they have been given authority by owners.

Authorisation

I instruct Standard Life to make the changes as set out in this form

Policy owner 1 signature



| DD / MM / YYYY

Policy owner 2 signature



| DD / MM / YYYY

if applicable, for and on behalf of

What happens next?

Send this completed instruction to your Financial Adviser or directly to Customer Service Division, Standard Life, 90 St Stephen's Green, Dublin 2.

We will carry out your instructions as soon as possible. Normally, this means:

- If Standard Life receives the switch request before 5 pm, the switch will be processed using the prices that apply 2 working days after receipt (e.g. if received at 3 pm on Tuesday, the switch will be processed using Thursday's prices).
- If the request is received after 5 pm, the switch will be processed using the prices that apply 3 working days after receipt (e.g. if received at 5.30 pm on Tuesday, the switch will be processed using Friday's prices).

We will send you confirmation when the changes have been made.

Prices are normally, but not necessarily, declared each working day.