

Application form for additional investments



For use with the following:

Flexibond (post 2/10/2000)
GA Escalator Investment Bond
GA Investment Bond
GA Portfolio Bond (pre 25 October 1995)
International Personal Pension
International Investment Plan
PM Investment Bond

Policy number

Important notes on completing this form

Before you complete this form, please ask your financial adviser about funds currently available. If you don't have an adviser, you can find one at unbiased.co.uk (remember there may be a charge for any advice). Alternatively, go to aviva.co.uk/retirement/fund-centre/

Please write in the boxes provided in **black ink** using BLOCK CAPITALS and use a tick (✓) for any tick boxes.

It is essential you complete the form in full, or we will be unable to complete your application.

Please note that our funds have annual management charges of between 0.875% and 1.95%.

Please remember to sign the form before you send it back to us.

Trust cases – if the policy is written under trust, the trustees should sign this form and they should satisfy themselves that any additional investment is in accordance with the terms of the trust and is not in breach of any trust powers. We would recommend that the trustees take independent legal advice.

Where you need to send this completed application form

The additional investment will be applied to your policy from the date Aviva receive this fully completed application form, payment and any other relevant documents that you have ticked as attached, at the address given below.

Please ensure all relevant documentation is attached to this application and send to:

**Aviva
PO Box 520
Norwich
NR1 3WG**

If you are paying via telegraphic transfer please tick this box.

Please send payment to sort code 40-02-50 and account number 01057081, quoting account name Aviva Life and Pensions UK Limited and your policy number.

Please email BONDSUK@aviva.com confirming the amount, the submitted date and policy number

Important notes about making additional investments

Accounts outside the UK only.

If you have any other bank account details that will help us with your payment, please include them on this page.

Swift/BIC code

IBAN/account number

Reference, e.g Policy Number

For European bank accounts we'll also need the IBAN details.

- Please note that different funds have different risks associated with them. You should always consider the type of fund you are invested in and the associated risks – for the latest information about your chosen fund(s) please visit our fund centre at aviva.co.uk/funds, where you can also download the latest fund factsheet. Please note that fund objectives, risk ratings and charges of individual funds can change over time.

Minimum investments into the bonds are:

£500 – GA Escalator Investment Bond, GA Investment Bond, GA Portfolio Bond (pre 25 October 1995), International Personal Pension

£1000 – Flexibond (post 2 October 2000), PM Investment Bond, International Investment Plan

Please note that you can only invest into 6 funds at any one time, with the exception of Flexibond where you can invest in up to 10 funds and International Person Pension where you can invest in up to 3 available funds. This includes any current investments in the bond that you have.

Please note any subsequent money you withdraw from this bond may be taken from your newer investments first and different charges/bonus rates may apply. As different products have different ways of withdrawing money please check your terms and conditions.

The maximum age that additional premiums can be paid into the products is age 89, except the PM Investment Bond where there is no restriction.

- **With-profits funds** - If you are making an additional investment into a with-profits fund please note the following before signing this form:

For additional investments into a with-profits fund the maximum investment is £1m. Where you already invest in and intend to make an additional investment into a with-profits fund you can't increase the amount invested in with-profits to over £1m.

If you make a withdrawal/switch out from your investment in a with-profits fund we may apply a market value reduction (MVR). The amount of MVR depends on the date(s) you invested your money into the with-profits fund. An MVR is most likely to be applied following a large or sustained fall in stock markets or when investment returns are below the level we normally expect. We will advise you if an MVR is applying before you withdraw or switch out of the with-profits fund. To find out if an MVR will apply if you take money out of your plan, you can call us on 0800 068 6800. Lines are open Monday to Friday 8am to 8pm, Saturday 8.30am to 5pm and Sunday 10am to 4pm, calls may be monitored and will be recorded, or speak to your financial adviser.

1. Personal details

First policyholder/Investing trustee

Second policyholder/Investing trustee (if applicable)

Title

Surname

Forenames

Address

Postcode

Email

Occupation

Before tax Annual Income

This should be the total income from all sources including pensions and benefit payments.

£

£

Source of Investment

Accumulated savings from salary

Redundancy

Property Sale

Retirement Fund

Inheritance

Divorce Settlement

Other (please specify details in box below)

1. Personal details continued

Third policyholder/Investing trustee (if applicable)

Fourth policyholder/Investing trustee (if applicable)

Title

Surname

Forenames

Address

Postcode

Email

Occupation

Before tax Annual Income
£

£

This should be the total income from all sources including pensions and benefit payments.

Source of Investment

Accumulated savings from salary

Redundancy

Property Sale

Retirement Fund

Inheritance

Divorce Settlement

Other (please specify details in box below)

2. Details of your investment

I/We wish to invest £ (in whole pounds only)

Please write the name of each fund you want to invest in, plus the percentage of your investment into each fund in the last column.

You can invest in up to six funds, unless you have a Flexibond where you can invest in up to ten or the International Personal Pension where you can invest in up to three funds. This includes any current funds you are invested in. You must make sure that the total across all funds equals 100%.

Fund name (e.g. Aviva Deposit)	Percentage (of total investment)
	%
	%
	%
	%
	%
	%
	%
	%
	%
	%
	%
	%
	%
	TOTAL 100%

3. Do you require regular withdrawals from your bond? (Not available for International Personal Pension)

If you do not wish to take regular withdrawals from your investment please go straight to section 4.

If you are already taking regular withdrawals from your bond, and do not wish to change them please go to section 4, alternatively if you wish to make changes, please complete the details below.

All applicants requiring a payment MUST complete section 3a below followed by 3b.

3a Bank payment details

Your bank details (the account your regular payments should be paid into)

Name of bank/building society

Address

Postcode

Sort code

Account name

Account number

Roll number (if building society acc)

Important

If you would like to take regular withdrawals, please **go to section 3b.**

3. Do you require regular withdrawals from your bond? (Not available for International Personal Pension) continued

3b Taking regular withdrawals

Please complete this section if you would like to take regular withdrawals from your bond. Payments will be made direct to your bank or building society account.

What payment frequency would you like?

Monthly

Quarterly

Half-yearly

Yearly

To provide your regular withdrawals, units will be cancelled six days before the date of payment to enable the payment to be made on your chosen date.

How much would you like each payment to be? - minimum £50 each payment

£						.		
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D	D	M	M	Y	Y	Y	Y

Payment start date

Payments can only be made on the **8th, 15th, 22nd** or **28th** of the month.

There are two ways in which you can take withdrawals from the funds you invest in:

- Pro-rata** - this means the units we cancel to pay your withdrawal are cancelled in equal proportions across all the funds you are invested in. This process will continue even if you change the funds you invested in. Please tick here if you wish to take pro-rata withdrawals.
- Fund-specific** - this means we only take your withdrawals from funds which you've specified.

To request fund-specific withdrawals please complete the table below.

(maximum 20% a year of your initial investment for each fund and minimum £20 for each fund – still subject to the minimum of £50 for total payments).

Remember, if you change funds later on, you'll need to review your fund-specific withdrawals, to ensure they continue to work for you.

Fund name	Amount to be withdrawn from each fund							
	£						.	
1.	£						.	
2.	£						.	
3.	£						.	
4.	£						.	
5.	£						.	
6.	£						.	
7.	£						.	
8.	£						.	
9.	£						.	
10.	£						.	
TOTAL	£						.	

4. Declaration

Financial Crime

To verify your identity and prevent financial crime, your information may be used by any company within the Aviva group. It may also be shared with third parties who provide services to us, and any other organisations, where required to by law and regulation.

We may record any searches carried out. These, and any suspicion of financial crime, may be used to help other companies with verification and identification. The search isn't a credit check and your credit rating shouldn't be affected.

Declaration by each applicant/investing trustee

The Terms and Conditions and Key Features of your policy are important and you should take the time to read them. Please ask for a copy of these documents if you haven't already received them. If there are any terms that you don't understand then you should ask for further information.

I understand that the Terms and Conditions will apply to my plan.

- I declare that to the best of my knowledge and belief the statements on this application and all other declarations relating to it are true and complete.
- I understand that a copy of the Terms and Conditions and/or a completed application form is available on request.
- I understand that any additional investment accepted by Aviva will be in accordance with the Terms and Conditions of the existing bond identified in this application.
- I understand that you may undertake a search with third party companies who provide identity verification services for the purposes of verifying my identity and the details I have submitted as part of this application. To do so the third party companies may check the details I supply against any particulars on any database (public or otherwise) to which they have access. They may also use my details in the future to assist other companies for verification purposes. A record of the search will be retained.

Additional declaration by each investing trustee (if applicable)

- I declare and confirm that the powers under the trust are sufficiently wide to allow trust monies to be used to invest in this non-income producing policy of life assurance.

Data Privacy

To learn about how Aviva processes Personal Information, please see our privacy policy at [aviva.co.uk/privacypolicy](https://www.aviva.co.uk/privacypolicy). It's updated from time to time to take account of changes in our business activities, legal requirements and to make sure it's as transparent as possible, so please check back in to see the latest version. A paper copy can be provided on request by writing to: **Data Protection Team, PO Box 7684, Pitheavlis, Perth, PH2 1JR.**

Signature(s) to declarations and consent

**First policyholder/
Investing trustee**

Signature

Date

Day		Month		Year			

**Second policyholder/
Investing trustee (if any)**

Signature

Date

Day		Month		Year			

**Third policyholder/Investing
trustee (if applicable)**

Signature

Date

Day		Month		Year			

**Fourth policyholder/Investing
trustee (if applicable)**

Signature

Date

Day		Month		Year			