

# Aviva **investment bond** switch form

**This switch form is suitable for use with the following investment bonds:**

Select Investment

Portfolio (Step Down & Level)

Co-operative Investment Bond

Norwich Union Flexibond (Post October 2000)

Norwich Union Bond 2000 (Post October 2000)

Norwich Union Portfolio Bond (Post October 2000)

GA Escalator Investment Bond (only % switches are allowed)

GA Investment Bond

CGU Portfolio Bond

GA Portfolio Bond

PM Investment Bond

## Important notes on completing this form

Before you complete this form, please ask your financial adviser about funds currently available for switching. For tailored advice, you should speak to your financial adviser. If you don't have an adviser, you can find an up-to-date list of regulated advisers at [moneyhelper.org.uk/retirement-adviser-directory](https://moneyhelper.org.uk/retirement-adviser-directory). Advisers may charge for their advice. If so, there are often a number of ways to pay. Alternatively, go to our fund centre at [aviva.co.uk/retirement/fund-centre/](https://aviva.co.uk/retirement/fund-centre/). 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](https://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.

If you have chosen an income fund or where you wish to receive regular withdrawals please complete the regular withdrawals form.

### **For the following products, you can invest in up to 10 funds at any one time:**

Select Investment

Portfolio (Step Down & Level)

Co-operative Investment Bond

Norwich Union Flexibond (Post October 2000)

Norwich Union Bond 2000 (Post October 2000)

Norwich Union Portfolio Bond (Post October 2000)

### **For the following products, you can invest in up to 6 funds at any one time:**

GA Escalator Investment Bond

GA Investment Bond

CGU Portfolio Bond

GA Portfolio Bond

### **For the following product, you can invest in all available PM funds:**

PM Investment Bond

Use black ink and BLOCK CAPITALS and tick the appropriate boxes.

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

If an agent has been authorised to make switching requests, this application should be signed by that agent, who must also have submitted a form of switching authorisation signed by the policyholder(s).

A copy of the terms and conditions applicable to your policy and/or your completed application form is available on request.

**Trust cases - If the policy is written under trust, the trustees should sign this form and they should satisfy themselves that any switch is in accordance with the terms of the trust and is not in breach of any trust powers. If in doubt we would recommend that the trustees take independent legal advice. Aviva cannot be held responsible in such circumstances.**

Unless you have been instructed otherwise your completed switch form should be returned to **PO BOX 520 Norwich NR1 3WG.**

## Important notes about fund switching

- Fund objectives, risk ratings and charges of individual funds can change over time – so to check the latest information about your chosen fund(s) please visit our fund centre at [aviva.co.uk/retirement/fund-centre/](http://aviva.co.uk/retirement/fund-centre/) and download the latest fund factsheet.
- In certain circumstances we may need to delay switching your funds as outlined in your plan terms and conditions. This could be as a result of adverse market conditions or where it would lead to the unfair treatment of other investors. The delay may be up to one month for most funds or up to six months if the fund you're invested in cannot be easily converted to cash. This includes: a property fund or a fund that's fully or partly invested in the form of land or buildings. After such a delay in switching the unit price used will be the price applicable at the end of the deferred period.
- If your request is sent by fax or courier or any other form of instant communication, is received after 5pm on any working day, or involves switching into or out of a fund which is subject to additional switching restrictions, then we may use unit prices up to two working days later when actioning your request. The switch confirmation letter we send you will confirm the effective date of the switch.
- If you're taking fund specific ongoing adviser charges, and you choose to switch out of a fund from which the charges are taken, you need to let us know which funds you would like your charges to now be taken from. If we don't hear from you, following the switch we'll start to take your ongoing adviser charges proportionally across all funds.
- Copy of the terms and conditions and /or completed application form is available on request
- **With-profits funds** – If you're switching in or out of with-profits please note the following points before signing this form:

For switches into with-profits funds the maximum investment is £1m. Where you already invest in, and intend to switch into a with-profits fund, you can't increase the value invested in with-profits funds to over £1m.

We may apply a market value reduction (MVR) if you switch money out of a with-profits fund which would reduce the monetary value that is switched to the chosen fund. This is to make sure customers remaining in the With-Profits Fund are not disadvantaged when others leave. We only apply MVRs following a large or sustained fall in stockmarkets or when investment returns are below the level we normally expect.

To find out the current position on whether a market value reduction applies phone us on **0800 068 6800**.

**Smooth Managed Fund range** – Only available on Select Investment and Portfolio (Step Down and Level) via a Financial Adviser. For switches into a Smooth Managed Fund the maximum investment is £1m. Please ask your Financial Adviser for a copy of the current terms and conditions for your product.

Please note that switches in and out of a Smooth Managed Fund are limited to one switch in each calendar quarter (i.e. 1 January – 31 March, 1 April – 31 June, 1 July – 30 September, 1 October – 31 December).

Policy number

## Personal details

### First policyholder/investing trustee

Surname	<input type="text"/>	Title	<input type="text"/>
Forenames	<input type="text"/>		
Email	<input type="text"/>		

### Second policyholder/investing trustee (if any)

Surname	<input type="text"/>	Title	<input type="text"/>
Forenames	<input type="text"/>		
Email	<input type="text"/>		

### Third investing trustee

Surname	<input type="text"/>	Title	<input type="text"/>
Forenames	<input type="text"/>		
Email	<input type="text"/>		

### Fourth investing trustee (if any)

Surname	<input type="text"/>	Title	<input type="text"/>
Forenames	<input type="text"/>		
Email	<input type="text"/>		

## Switching requirements

### Examples

#### Switching between funds

You currently invest in the With-Profit and Deposit funds. You wish to switch 50% of the value of your holding in the With-Profit Fund and all of the value of your holding in the Deposit Fund into the Mixed Investment (20-60% Shares) and Mixed Investment (40-85% Shares), to be split equally.

Switch from		
Fund name	% of current fund value	OR amount (£)
Aviva With-Profit 2	50%	
Aviva Deposit	100%	
<b>TOTALS</b>		<b>£</b>

Switch to		
Fund name	% of current fund value	OR amount (£)
Aviva Mixed Investment (20-60% Shares)	50%	
Aviva Mixed Investment (40-85% Shares)	50%	
<b>TOTALS</b>		<b>£</b>

Switch from		
Fund name	% of current fund value	OR amount (£)
1		
2		
3		
4		
5		
6		
7		
8		
9		
10		
<b>TOTALS</b>		<b>£</b>

Complete only if each fund selected shows an actual amount

These two amounts must be the same (if completed)

Switch to		
Fund name	% of current fund value	OR amount (£)
1		
2		
3		
4		
5		
6		
7		
8		
9		
10		
<b>TOTALS</b>	<b>100%</b>	<b>£</b>

This column **must** total 100%. EXAMPLE: If you wished to switch 25% from Mixed Investment (40-85% Shares) equally into UK Equity Fund and Property Fund you would show 50% of switched value alongside each 'switch to' fund.

## Declaration

### Declaration by each policyholder/investing trustee

- I/we instruct Aviva to switch my/our investment between funds in accordance with my/our fund selection set out in the section headed “Switching requirements”.
- I/We understand that my bond terms and conditions apply and that the switch will take place in accordance with the policy terms and conditions and may not be available in certain circumstances.
- I/We have read the objectives of the fund (s) into which I am/we are switching, and confirm that I/we accept any additional risks and fund charges that may apply as a result of this switch.
- I/we understand that if I/we switch into the Guaranteed 100 Fund or the Guaranteed 90 Fund, the guaranteed minimum value on the guarantee date, and the minimum death benefit, will be based on a percentage of the value of my/our investment in the fund on the effective date of the switch. The percentage applied will vary depending on which of the Guaranteed Funds I/we have chosen to switch into.

### Signature(s)

**First policyholder/investing trustee** Signature

Date

**Second policyholder/investing trustee (if any)** Signature

Date

**Third investing trustee (if any)** Signature

Date

**Fourth investing trustee (if any)** Signature

Date

## 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. If you need a paper copy, write to us at: **Data Protection Team, PO Box 7684, Pitheavlis, Perth, PH2 1JR.**

# Get in touch

If you have any questions, you can:



Call us on: **08000 686 800** at the following times: **Monday to Friday** between **8.30am and 6pm**.

- We may record calls to improve our service.
- Calls may be charged and these charges will vary, please speak to your network provider.



Email us at: [contactus@aviva.com](mailto:contactus@aviva.com)



Write to us at: **Aviva, PO Box520, Surrey Street, Norwich NR1 3WG, United Kingdom**

## Need this in a different format?

Please get in touch if you'd prefer this form (**IN13200**) in large print, braille, audio, or in a different colour.

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