

Application form for an additional investment into Select Investment Growth & Income Option



Policy number

Important notes on completing this form

Please request an illustration by emailing bondsuk@aviva.com or call us on **0800 068 6800** with the following information:

- Your name and policy number
- The amount of your additional investment
- Any changes you require to your policy including changes to withdrawals or fund choices.

If you're a financial adviser please confirm if there's any change to the adviser charging, or additional charge for setting up the additional investment.

Before you complete this form, please ask your financial adviser about funds currently available. If you don't have an adviser, call the Aviva Financial Advice team on **0808 239 6379** or go to aviva.co.uk/investments/aviva-financial-advice/investment-advice to find out more. Alternatively, you can visit unbiased.co.uk to help you find a financial adviser. Or if you want to find out more about the funds available yourself, you can 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 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.

Trust Registration – if your policy is written into a trust, there may be an action to register the trust with HMRC. Registration is the trustee's responsibility. As part of our checks, we may ask to see evidence that this has been done. If you can't show us proof, this may delay your policy being processed. You can find more information about the Trust Registration Service on the **Government website**. If you're unsure about what you need to do, you should speak to a legal or financial adviser.

Where you need to send this completed application form

The additional investment will be applied to your policy from the date Aviva receive the additional payment. Please ensure all relevant documentation is attached to this application and send this to:

Aviva
PO Box 520
Norwich
NR1 3WG

If you are paying via electronic payment please tick this box.

You may also email the form to bondsuk@aviva.com and send an electronic payment. 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. We cannot accept third party payments unless the money is being paid from a solicitor's account. So please send the payment from an account in your name.

Important notes about making additional investments

Requirements for additional investments:

Minimum additional investment amount of £5,000

You must be under 85 at the time we receive your application for additional investment

You may only invest in a maximum of 10 funds at a time

For additional investments into the Smooth Managed Fund, the maximum investment is £1 million. Subject to our Terms and Conditions at the time.

Additional investments into with-profits funds are not permitted.

- 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 aviva.co.uk/funds, where you can also download the latest fund factsheets, Key Information Document and Underlying Investment Option Document. Please note that fund objectives, risk ratings and charges of individual funds can change over time.
- Additional investments are subject to our Terms and Conditions at the time.

1. Personal details

First policyholder/Investing trustee

Second policyholder/Investing trustee (if applicable)

Title

Full name

Email

I'd like to access MyAviva online. If eligible, this will allow you to manage and monitor your policies conveniently from your computer, tablet or smart phone. This isn't available for trustees, deputies or attorneys at present.

Yes No

Yes No

Occupation

Gross 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)

Third policyholder/Investing trustee (if applicable)

Fourth policyholder/Investing trustee (if applicable)

Title

Full name

Gross 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 additional investment

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

In the table below, 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 ten funds at a time. This includes any current funds you are invested in.

You must make sure that the total across all funds equals 100%. You can only invest in one of our Smooth Managed Funds if you are applying via a financial adviser and receiving financial advice.

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

3. Do you require regular withdrawals from your bond?

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? 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.

Subject to a minimum of £20 from each fund and a total minimum payment of £50.

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									
	£								.	
	£								.	
	£								.	
	£								.	
	£								.	
	£								.	
	£								.	
	£								.	
	£								.	
	£								.	
	£								.	
	£								.	
	£								.	
TOTAL	£								.	

4. Adviser Charging

If you have a financial adviser, any existing agreement to pay ongoing adviser charges will remain in effect, the monetary value will not increase, as a result of this additional investment if a percentage was selected. It will be based on the original investment only.

If you and your financial adviser wish to add ongoing adviser charges to your policy, please complete an 'Adviser Charge Agreement' and send it to us along with this form.

If you and your financial adviser want to amend an ongoing adviser charge or pay a single charge for setting up this additional investment, please complete the details below.

Please refer to your original agreement for the terms and conditions that apply when setting up adviser charging.

Single adviser charge amount

This payment will be taken proportionately across all funds. If you want to make this payment from specific fund, please complete the 'Adviser Charge Agreement'.

Ongoing adviser charge

The frequency and basis will remain as per the current payment. If you want to change the frequency or fund(s) where the payment is taken from, please complete a new 'Adviser Charge Agreement'

Charges will be paid at the next available date, please note if you select a single charge that amount will be paid, followed by the ongoing charge, one month later.

5. Declaration

Financial Crime

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

A record may be kept of any searches carried out and any suspicions of financial crime and related details may be retained and used to assist other companies for verification and identification purposes. The search is not a credit check and your credit ratings should not be affected.

Declaration by each applicant/investing trustee

- I/we understand that this additional investment, if accepted by Aviva, is subject to the Terms and Conditions in force at the time Aviva receives the application for additional investment. Your financial adviser can provide you with a copy of the Terms and Conditions and the Key Features. Please contact us for a copy of these documents if you haven't received them.
- I/we 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/we understand that a copy of the Terms and Conditions and/or a completed application form is available on request.
- I/we understand that any additional investment accepted by Aviva will apply to the policy identified on the first page of this application.
- I/we 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/we have submitted as part of this application. To do so the third party companies may check the details I/we 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/we 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			

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IN88058 12/2022 © Aviva

