

Fund switch and redirection of future contributions request form



Aviva may apply a switch charge to any fund variation. For details of when we would apply a switch charge please refer to your Terms & Conditions.

If you need further information please contact your financial adviser. They may charge you for their services.

Please use BLOCK CAPITALS throughout.

To: Aviva, Customer Services Department
 Po Box 1550, Salisbury, SP1 2TW
 Tel: +44 (0) 1722 415 088
 Fax: +44 (0) 1722 332 005
 or email to olab@dgaviva.com

First policyholder

Second policyholder (if applicable)

Full name

Telephone

Policy Number(s)

Switch only (existing funds) **Redirection Only** (future funds) **Both**
 Complete section A only Complete Section B only Complete Sections A & B

A – Switch existing holdings to:

I/We (delete as applicable) request Aviva to vary the allocation of units in the policy/policies numbered above and to distribute **all** the units to funds as stated below at the percentages and currency shown.

Fund	Currency	Percentage (please specify whole percentages only)
Total		100%

B – Redirection of future premiums to:

I/We (delete as applicable) request Aviva to allocate future contributions to the policy/policies numbered above to the funds listed below at the percentages and currency shown. I wish this to be done at the next allocation of units after that date that Aviva receives these instructions at the address above.

Fund	Currency	Percentage for each new fund (please specify whole percentages only)
Total		100%

If you're unable to express your instructions in the above format, please give details here.

I/We Confirm that I am/we are entitled to give this authorisation for the above request(s) and understand that the instructions will operate in accordance with the current terms and conditions for fund variation.

	First policyholder	Second policyholder (if applicable)
Signature(s)	<input style="width: 90%;" type="text"/>	<input style="width: 90%;" type="text"/>
Date	<input style="width: 90%;" type="text" value="D D M M Y Y Y Y"/>	<input style="width: 90%;" type="text" value="D D M M Y Y Y Y"/>
Signature(s) of Trustee(s) or Assignee(s)	<input style="width: 100%; height: 40px;" type="text"/>	

Signatures

If the policy is assigned or written under trust, the signatures of the Assignees (or their nominated signatories) or all of the trustees are required, unless the trust form specifically allows the Member/Policyholder to vary funds acting alone.

Fund Links

The maximum number of funds in which a bond can be invested is 10 at any one time. A plan may also be invested in up to 10 funds at any one time.

Switching

Any switching instructions will be carried out at the bid price determined at the pricing of the fund immediately following receipt of the form, correctly completed and signed, at Aviva's Salisbury Office, unless it is considered necessary to defer switching of units in accordance with the policy conditions.

In all cases where a switch out of the With Profit fund is possible, a market value reduction (MVR) may apply to reduce the value of the units before the switch.

If you have any queries regarding this fund variation form please contact your financial adviser or Aviva.

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 Registered office: Aviva, Wellington Row, York, YO90 1WR.
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