

Fund authority form

(customer to adviser)



This form gives your financial adviser authority to make investment switch or redirection decisions on your behalf. Please sign this form and return to your financial adviser if you are happy for them to take these decisions on your behalf.

Please take this form as my authority to allow the following adviser to make investment switch or redirection decisions on my behalf.

Name of financial adviser

Address of financial adviser

Address line 1	
Address line 2	
Address line 3	
Town	
County	Postcode

FCA number

My account/policy number

My address

Address line 1	
Address line 2	
Address line 3	
Town	
County	Postcode

Signed

Date

Once completed please return this form to your financial adviser or alternatively post to: Retirement Advantage, PO Box 4993, Worthing, BN99 4AE.

If you have any queries then please do not hesitate to call our customer servicing team on 0800 032 7690 or email customers@retirementadvantage.com.

