

# The Retirement Account



## Fund switch form

Name

Retirement Account number

This form should be completed and returned if you wish to switch some or all of your unit holdings into different funds.

**Switching** units means that the value of your chosen units will be switched into your new fund choice.

Before making a decision you should read the Investment Fund Summary and The Retirement Account Technical Summary which are available from our website [www.retirementadvantage.com](http://www.retirementadvantage.com).

### Funds you wish to switch from

Fund name	% you want to switch out

### Funds you wish to switch to

Fund name	% you want to switch in

Please note that switching of units cannot be backdated.

Signature

Date

**Please complete this form and return to: [new.business@retirementadvantage.com](mailto:new.business@retirementadvantage.com).**