

Flexible Income Annuity fund switch form

Name:

Annuity no(s):

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 fund information available on our website retirementadvantage.com.

Section A - Switching of existing units

Existing fund	% of value	New fund

Important notes regarding effective date. Please note that switching of units cannot be backdated.

Signature

Date

Please complete this form and return to: pensions.team@retirementadvantage.com.