



**B SWITCHING ALL OF YOUR EXISTING FUNDS**

If you would like these fund choices and percentages to also be applied to your future regular premiums, please tick this box. (✓)

If this fund choice is not to be applied to future regular premiums, please leave the tick box blank and complete section D.

**Switch out of ALL funds - 100% into:**

Only select funds in the same currency as your policy.

FUND ID	NAME OF THE FUND(S)	%
Example 85012	Example GBP Deposit	Example 100%
	Total	100 %

Please note: a minimum of 1% can be invested in any one fund, up to a maximum of 100 funds and whole percentages only - not cash amounts.

If you require additional space, please photocopy this page and attach the details with this form.

If you are providing additional pages please tick here

Each additional page should be initialled by each person requesting the redirection and/or switch.

**C SWITCHING OF INDIVIDUAL FUNDS**

**Switch out of individual funds** (Please continue on a separate signed sheet if necessary.)

If you intend to retain an interest in the fund being switched, please complete as per the example.

**Example Switch instruction**

<b>Switch out of</b>	85012 GBP Deposit	
		100 %

<b>Switch out of</b>		
		100 %

FUND ID	INTO	%
98570	UTM IM GBP Equity Portfolio	25 %
98573	UTM IM GBP Growth Portfolio	25 %
98576	UTM IM GBP Balanced Portfolio	25 %
85012	GBP Deposit	25 %
	<b>Total</b>	100 %

FUND ID	INTO	%
	<b>Total</b>	100 %

<b>Switch out of</b>		
		100 %

<b>Switch out of</b>		
		100 %

FUND ID	INTO	%
	<b>Total</b>	100 %

FUND ID	INTO	%
	<b>Total</b>	100 %

**D REDIRECTION OF FUTURE PREMIUMS**

If you would like a new investment choice to apply to future regular premiums which is different from the details outlined in section B, please complete the box below.

If no changes are required, please write 'No Change Required' in this box.

FULL UTMOST INTERNATIONAL FUND NAME	%
Total	100 %

**E AUTHORISATION**

This section must be completed and signed by the person(s) requesting the redirection and/or switch of investment choice. Please tick the relevant box to show the capacity in which you are acting.

1. I confirm that I have authority to request these transactions jointly with other person(s) (if any) signing below in the capacity stated.
2. I confirm that the Policy is not subject to any assignment except as stated.
3. The Fund Adviser: (only applicable where the switch is requested by the Fund Adviser)
  - a. confirms that a Delegated Investment Authority or similar document (The Authority) is currently in force authorising the signatory(ies) below to make investment decisions on behalf of the Policyholder. The Authority (or a certified copy) has been sent to Utmost International or is enclosed. The Authority has been prepared in accordance with the relevant statutory provisions in the Fund Adviser's country of residence.
  - b. will indemnify Utmost International for any losses arising from carrying out the transactions if the request is made without sufficient lawful and/or Policyholder authority.

**SIGNATURE**

Full name

Capacity (✓)

Accountholder     
  Fund Adviser     
  Other

Date

d	d	m	m	y	y	y	y
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**SIGNATURE**

Full name

  


Capacity (✓)

Accountholder

Fund Adviser

Other

Date

d	d	m	m	y	y	y	y
---	---	---	---	---	---	---	---

**SIGNATURE**

Full name

  


Capacity (✓)

Accountholder

Fund Adviser

Other

Date

d	d	m	m	y	y	y	y
---	---	---	---	---	---	---	---

**SIGNATURE**

Full name

  


Capacity (✓)

Accountholder

Fund Adviser

Other

Date

d	d	m	m	y	y	y	y
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You will receive a letter to confirm that your Switch request has been processed.

Please return this form to:

Utmost International  
 King Edward Bay House, King Edward Road, Onchan,  
 Isle of Man, IM99 1NU, British Isles

**A WEALTH *of* DIFFERENCE**

[www.utmostinternational.com](http://www.utmostinternational.com)

Calls may be monitored and recorded for training purposes and to avoid misunderstandings.

Utmost International Isle of Man Limited is registered in the Isle of Man under number 024916C.

Registered Office: King Edward Bay House, King Edward Road, Onchan, Isle of Man, IM99 1NU, British Isles.

Tel: +44 (0)1624 655 555 Fax: +44 (0)1624 611 715. Licensed by the Isle of Man Financial Services Authority.

Utmost Wealth Solutions is registered in the Isle of Man as a business name of Utmost International Isle of Man Limited.

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