

SWITCH INSTRUCTION FORM

Utmost Wealth Solutions is the brand name used by a number of Utmost companies. This item has been issued by Utmost PanEurope dac.

IMPORTANT INFORMATION

Please ensure that all sections are fully completed. In this form words in the singular shall include the plural and vice versa.

HOW TO COMPLETE THIS FORM

This form should be **completed by the Owner(s)** using **blue or black ink** and **BLOCK CAPITALS**. If you make a mistake, cross it out, put in the correct words and sign your initials next to the correction. **Do not use correction fluid.**

WHAT TO DO WHEN YOU HAVE COMPLETED THIS FORM

Our preference is to receive documentation scanned and emailed. Please return the completed form(s) and supporting suitably certified documentation to Info@UTMOST.ie.

If you are unable to send documentation electronically, it can be posted to Utmost PanEurope dac, Bishop's Square, Redmond's Hill, Dublin 2, Ireland.

HOW WE USE YOUR INFORMATION

Our Privacy Statement explains when and why we collect personal information about our customers, how we use it, the conditions under which we may share it with others and how we keep it secure. It also explains how long we keep customer information for, how a customer can obtain details of the information we keep and the choices customers have about how we use that information. You can find a copy at www.utmostwealth.com/privacy-statement or you can request a copy from our Client Relations Team.

USING THE EDITABLE FIELDS?

To ensure your information is saved correctly, we recommend you save the form to your desktop before you start completing the required fields.

A POLICY DETAILS

Policy Number

Contract Type

B BOND OWNER(S)

	Owner 1	Owner 2
Title (Mr, Mrs, Miss or Other)	<input type="text"/>	<input type="text"/>
Surname	<input type="text"/>	<input type="text"/>
Forenames (in full)	<input type="text"/>	<input type="text"/>
Address (for correspondence)	<input type="text"/>	<input type="text"/>
	<input type="text"/>	<input type="text"/>
	<input type="text"/>	<input type="text"/>
Postcode	<input type="text"/>	<input type="text"/>

BOND OWNER(S) - TRUSTEE/CORPORATE INVESTORS ONLY

Name of Trust/Corporate Body

Address
(for correspondence)

Postcode -

Please complete the details below for all of the Trustees / Authorised Signatories who are authorised to give instructions relating to this policy.

If there are more than 2 Trustees/ Authorised signatories, photocopy this page, complete and attach securely to this form.

	Trustee/Authorised Signatory 1	Trustee/Authorised Signatory 2
Name	<input type="text"/>	<input type="text"/>
	<input type="text"/>	<input type="text"/>

C CHANGING HOW YOUR POLICY IS INVESTED

Indicate the type of change you want to make by ticking one box below.

- a) Switch existing investments only (single premium investments)
- b) Switch existing investments, AND Redirect future investments only (regular premium investments)

The fund switch will be processed:

- a) Using the unit price of the date of receipt of your written request

OR

- b) At a later date (please specify)

IMPORTANT INFORMATION

Switch instructions will normally be carried out on the date as specified in section C using the prices available on that date.

We will normally allow 4 free switches per year for Life policies and 12 per year for Pension policies between Utmost PanEurope dac fund. Thereafter fund switches will be subject to a charge.

Charges vary from fund to fund. If you decide to switch funds, the ongoing charges incurred by your policy may change. For details of the charges that apply to each fund, please contact us.

Utmost PanEurope dac recommend that you seek independent advice from your financial adviser before switching to an alternative fund.

D SWITCHING EXISTING INVESTMENTS

Complete the table below if you wish to change your existing investment.

Using the table below, indicate where you would like to switch the existing investment and the percentage to be invested into each new fund.

Existing fund name	Proportion of investment to be switched %		

New fund name	New fund selection of investment switched %		

The new fund selection must total 100%. If this does not total 100%, we will not be able to action your request and will need to contact you further.

Total 100%

E DECLARATION

- › I/We declare that I/We have the authority to give instructions in respect of the above numbered policy.
- › I/We instruct Utmost PanEurope dac to carry out the switch in accordance with the details above.

SIGNATURE


**Signature of Owner /
Authorised Signatory 1**

**Signature of Owner /
Authorised Signatory 2**

Date

d	d	m	m	y	y	y	y
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d	d	m	m	y	y	y	y
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If there are more than 2 Trustees/ Authorised signatories, photocopy this page, sign and attach securely to this form. 

A WEALTH *of* DIFFERENCE

www.utmostinternational.com

Utmost PanEurope dac (registered number 311420) is regulated by the Central Bank of Ireland.

Registered Office address: Navan Business Park, Athlumney, Navan, Co. Meath, C15 CCW8, Ireland.

Utmost Wealth Solutions is registered in Ireland as a business name of Utmost PanEurope dac.

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