

# SWITCH INSTRUCTIONS - INTERNAL FUNDS

You should use this form if you wish to switch some, or all, of your investment in our internal funds.

This form can be used for any of the following products:

- › Estate Planning Portfolio
- › Flexible Investment Plan
- › Investment Portfolio (Bond phase only)
- › Wealth Management Portfolio (where you do not have a portfolio cash account and are investing solely in our internal funds)

## PRIVACY STATEMENT

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-statements](http://www.utmostwealth.com/privacy-statements) or you can request a copy from our Client Relations Team.

## HOW TO COMPLETE THIS FORM

Please complete all relevant sections of this form by typing in the fields. Once complete, print and sign using a pen.

Alternatively, print and complete this form in **BLOCK CAPITALS** using **blue or black ink**.

You can scan and email this form to [WM@utmost.ie](mailto:WM@utmost.ie)

If you have any problems with transmission, call 0845 6029281 if you are calling from the UK, or 00 44 845 6029281 if you are calling from outside the UK.

Alternatively, you can send this form by post to:

**Utmost PanEurope dac, Ashford House, Tara Street, Dublin 2, D02 VX67, Ireland.**

## A POLICYHOLDER OR SCHEME DETAILS

1	Policy number	<input type="text"/>
2	Name(s) of policyholder(s) or scheme name	<input type="text"/> <input type="text"/> <input type="text"/>
3	Telephone number	<input type="text"/>
4	Email address	<input type="text"/>

## 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 PanEurope dac is regulated by the Central Bank of Ireland (No 311420). Its registered office is Navan Business Park, Athlumney, Navan, Co. Meath C15 CCW8, Ireland. Utmost PanEurope dac is a Category A Insurance Permit holder with the Jersey Financial Services Commission.

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

UIC PR 0130 | 11/22

**B INSTRUCTIONS TO SWITCH**

**B1 - FUND SWITCH**

You should complete this sub-section if you wish to switch between one or more internal fund(s).

For the list of the funds available to you, you should refer to our website at [www.utmostwealth.com/former-athora](http://www.utmostwealth.com/former-athora)

If you have invested all or some of your investment in our Managed Risk Portfolios and have now decided to switch that part of the investment, you must switch to another of our Managed Risk Portfolios.

We will apply these instructions as follows:

- › For any instruction we receive before 12pm, the switch instructions will be processed on that business day.
- › For any instruction we receive at or after 12pm, the switch instructions will be processed on the following business day.

Full name of existing fund to be sold	Value of units*	Percentage of units (%)*	Number of units*

If you need more space for funds, use a separate piece of paper, include the fund name and switch details in the same format as above, and sign and date it.

\*Complete only one of these boxes per fund.

To:

Full name of fund to be purchased	Percentage (%)
<b>Total</b>	<b>100%</b>

B2 - SWITCHES FOR THE FLEXIBLE INVESTMENT PLAN

You should only complete this section if you have a Flexible Investment Plan.

Please confirm which type of contribution the above instruction is to be applied to by ticking one of the following boxes.

☐ Switch existing holdings only

☐ Switch existing holdings and also change for future premiums due after the date of this switch

☐ Change investment direction for future premiums only.

If you do not select one of the above options, we will apply the instruction across the current fund holdings and future contributions.

C AUTHORISATION

In this authorisation, 'I/We' means the policyholder or trustee and 'you' means Utmost PanEurope dac.

I/We authorise you to complete this switch instruction and acknowledge that you will not be responsible for any delay, or consequence of any delay, in completing the transaction where a third party caused that delay.

	Policyholder or Trustee 1	Policyholder or Trustee 2	
SIGNATURE	<div></div>	<div></div>	SIGNATURE
Print full name	<div></div> <div></div>	<div></div> <div></div>	
Date	<div>d d m m y y y y</div>	<div>d d m m y y y y</div>	
	Policyholder or Trustee 3	Policyholder or Trustee 4	
SIGNATURE	<div></div>	<div></div>	SIGNATURE
Print full name	<div></div> <div></div>	<div></div> <div></div>	
Date	<div>d d m m y y y y</div>	<div>d d m m y y y y</div>	