

Income Drawdown Plan

Fund switch form

Important Information

This form should be completed if you wish to switch all of your funds into a different portfolio. The form can only be used for an Income Drawdown Plan. Please use **BLOCK CAPITALS** and black ink only and complete all relevant sections. Any amendments should be crossed out and initialled.

Please send your completed form to LFS, PO Box 1043, Cheltenham GL50 9JB. Or email the signed scanned document to PPPadmin@capita.co.uk. Please note that if this option is taken we are unable to guarantee complete security. If you have any queries about this form or need help, please call on 0345 055 0606 between 9am-5pm Monday to Friday.

If we receive your correctly completed form on a working day before the dealing cut-off time of 9am, we will process it at a price determined later that day. If we receive the form after the dealing cut-off time of 9am, it will be processed at a price determined the next working day.

For plans where there is an automatic rebalancing in operation, the switch will be processed the next working day. Once you have submitted your Fund switch form it cannot be cancelled.

1. YOUR DETAILS

Mr/Mrs/Miss/Ms/Other	<input type="text"/>
Surname	<input type="text"/>
First name(s)	<input type="text"/>
Permanent address	<input type="text"/>
	Postcode
Telephone number	<input type="text"/>
Plan number	<input type="text"/>

DATA PROTECTION

I consent to LFS using the information on this form and acknowledge that it will be held and may be processed by LFS or any third parties who provide services to LFS.

2. FUND CHOICE

Switches will be carried out in accordance with the **Terms and Conditions**. For portfolio information please see the **Guide to LF Investment Funds**. For fund information please visit pensions.linkfundsolutions.co.uk.

Please indicate which portfolios you wish to switch from and to.

Your Plan can only invest in a single portfolio. You must invest the full value of your Plan into this portfolio; this includes existing investments and future payments.

Portfolio to switch from: Portfolio selection	Risk rating	Select one please tick	Portfolio to switch to: Portfolio selection	Risk rating	Select one please tick
Drawdown Portfolio 1	Low	<input type="checkbox"/>	Drawdown Portfolio 1	Low	<input type="checkbox"/>
Drawdown Portfolio 2	Low-medium	<input type="checkbox"/>	Drawdown Portfolio 2	Low-medium	<input type="checkbox"/>
Drawdown Portfolio 3	Medium	<input type="checkbox"/>	Drawdown Portfolio 3	Medium	<input type="checkbox"/>
Drawdown Portfolio 4	Medium-high	<input type="checkbox"/>	Drawdown Portfolio 4	Medium-high	<input type="checkbox"/>
Drawdown Portfolio 5	High	<input type="checkbox"/>	Drawdown Portfolio 5	High	<input type="checkbox"/>

3. DECLARATION

For your own benefit and protection you should read the **Key Features, Terms and Conditions, Guide to Investment Risk** and **Guide to LF Investment Funds** before signing the declaration below.

- If you do not understand any point within these documents, you should ask your financial adviser for further information.
- I authorise LFS to switch any existing investment and future payments into the portfolio I have requested in Section 2.
- I understand that the switch will take place in accordance with the Terms and Conditions of my Plan.
- I confirm that I have read the objectives of the portfolio I am switching into, and I confirm that I understand this information and the associated investment risks.
- Subject to the conditions of my Plan, I understand that LFS will carry out my instruction.
- I understand that once I have submitted my Fund switch form it cannot be cancelled.

Print name (in **BLOCK CAPITALS**)

Signature

Date

D	D	M	M	Y	Y	Y	Y
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On completion of the switch we will send you a confirmation statement.

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