



# Investments – Changing your Investments

## MEMBER DETAILS

Name: \_\_\_\_\_ Date of birth: \_\_\_\_/\_\_\_\_/\_\_\_\_

Portfolio Number \_\_\_\_\_ Daytime Telephone \_\_\_\_\_

## NOTES

Before completing this form you should refer to the most recent Investment Statement to see what changes you can make to your investments. There are restrictions on the transfer or withdrawal of funds from certain investment funds and from the Personal Retirement Plan and Personal Superannuation Scheme.

## INSTRUCTIONS

- 1/ If you wish to reallocate your existing funds, complete section A
- 2/ If you wish to reallocate your future regular contributions, complete section B
- 3/ If you wish to 'Rebalance' your portfolio, complete section B and tick the 'Rebalance' box.
- 4/ **Ensure that you include the full details of the funds** you are switching from and switching to:
  - The name of the Investment Fund
  - The name of the Investment Account
  - Whether the fund is UT, IB, PRP, PUT, PSS\*

\*UT= Unit Trust, IB = Insurance Bond, PRP = Personal Retirement Plan, PUT = Personal Unit Trust, PSS = Personal Superannuation Scheme

## SECTION A - INVESTMENT OF EXISTING FUNDS

Please switch \$ \_\_\_\_\_ or \_\_\_\_\_ % of my funds:

FROM: \_\_\_\_\_

TO:

- \_\_\_\_\_ ( \_\_\_\_\_ %)
  - \_\_\_\_\_ ( \_\_\_\_\_ %)
  - \_\_\_\_\_ ( \_\_\_\_\_ %)
- 100%**

Please switch \$ \_\_\_\_\_ or \_\_\_\_\_ % of my funds:

FROM: \_\_\_\_\_

TO:

- \_\_\_\_\_ ( \_\_\_\_\_ %)
  - \_\_\_\_\_ ( \_\_\_\_\_ %)
  - \_\_\_\_\_ ( \_\_\_\_\_ %)
- 100%**

Please switch \$ \_\_\_\_\_ or \_\_\_\_\_ % of my funds:

FROM: \_\_\_\_\_

TO:

- \_\_\_\_\_ ( \_\_\_\_\_ %)
  - \_\_\_\_\_ ( \_\_\_\_\_ %)
  - \_\_\_\_\_ ( \_\_\_\_\_ %)
- 100%**

Please switch \$ \_\_\_\_\_ or \_\_\_\_\_ % of my funds:

FROM: \_\_\_\_\_

TO:

- \_\_\_\_\_ ( \_\_\_\_\_ %)
  - \_\_\_\_\_ ( \_\_\_\_\_ %)
  - \_\_\_\_\_ ( \_\_\_\_\_ %)
- 100%**

