



Change of servicing agent

Please complete in **BLOCK CAPITALS** and tick boxes where appropriate.

Policy number(s)

Name(s) of policyholder(s)

I/We request the servicing agent on the above policy(ies) be changed to:

Company name

Correspondence address

Postcode

Telephone number

E-mail address

Effective date (day, month, year)

FCA number

Policies established before 31 December 2012

Is existing servicing commission (if applicable) to continue to be paid to the new servicing agent? Yes No

The level of servicing commission cannot be increased after 31 December 2012

Servicing commission is calculated based on the policy value at the end of each calendar quarter. Commission payments will be made at the next available quarter end (after the effective date). For the Flexible Life Plan servicing commission does not apply and renewal commission is only payable after the end of the establishment period (as shown on your illustration/Personal Example).

Please see 'Starting or changing adviser charge deductions' for any other/new payment requests (document 6995).

	Policyholder/Trustee (1)	Policyholder/Trustee (2)
Signature	<input type="text"/>	<input type="text"/>
Full name	<input type="text"/>	<input type="text"/>
Date (day, month, year)	<input type="text"/>	<input type="text"/>
	Policyholder/Trustee (3)	Policyholder/Trustee (4)
Signature	<input type="text"/>	<input type="text"/>
Full name	<input type="text"/>	<input type="text"/>
Date (day, month, year)	<input type="text"/>	<input type="text"/>

Please note that all policyholders/trustees must sign and date this form. Upon request from your current or prospective professional adviser and at our discretion, you agree that we can provide your professional adviser with any information we hold about you, including any adviser charges deducted.