



---

**Signatures and declaration**

In this section, 'I/we' and 'my/our' means the policyholder/member or the trustees/professional advisers making the request.

Please switch the fund holdings in accordance with my/our instructions.

I/We understand that where I am/we are switching existing units (as shown in section A), the units being switched out will be cancelled at the relevant bid price on the day following receipt of this request. Units will then be purchased at the relevant bid price on the day following receipt of this request in my/our new chosen fund(s).

---

**This request must be signed by the member/policyholder. In addition, the signatures of the trustees will also be required (if the policy is an occupational pension the trustees will normally be the company).**

**A professional adviser (a suitably authorised individual, partnership, company or other body which is/are appointed by the policyholder to make investment decisions on their behalf), may only sign this form if specific fund switch authority is held by Canada Life.**

**Please print your name, sign and date (and tick the relevant box(es)).**

Full name (BLOCK CAPITALS)

Date (day, month, year)

Signature

Policyholder/  
member

Power of  
attorney

Trustee

Professional  
adviser

---

Full name (BLOCK CAPITALS)

Date (day, month, year)

Signature

Policyholder/  
member

Power of  
attorney

Trustee

Professional  
adviser

---

Full name (BLOCK CAPITALS)

Date (day, month, year)

Signature

Policyholder/  
member

Power of  
attorney

Trustee

Professional  
adviser

---

Full name (BLOCK CAPITALS)

Date (day, month, year)

Signature

Policyholder/  
member

Power of  
attorney

Trustee

Professional  
adviser

---

Please return this form to: **Canada Life Place, Potters Bar, Hertfordshire EN6 5BA**

---

---

### Important notes

1. All policy numbers to be switched must be listed. For a series of multiple policies, either list policies individually or if the whole multiple is to be switched, complete with the first and last number such as R1234567 – 599 incl.
  2. All policyholders/trustees must sign this form. No other signatures are acceptable unless we have specific switching authority, showing the policyholder(s)/trustees giving authority for us to accept instructions from another party.
  3. Where a partial switch has been requested, the whole value of the funds switching in section A will be totalled and reallocated as per the funds and percentages shown in section B.
  4. If we receive the correctly completed form before 3pm we will use the price date of the next valuation day. **Please note:** Whilst most funds are valued daily, some are valued less often.  
  
There may be a delay in carrying out a request to switch if we receive an incomplete request. If this is the case the price date we will use will be the day after we receive the correctly completed form.
  5. Switch fees, where applicable, will be deducted from units.
  6. The phased investment option is available on the:
    - Select Account (at any time)
    - Flexible Investment Bond (at any time)
    - Total Access Bond (at any time)
    - Select Investment Bond (at any time)
    - Trustee Investment Plan (on single premiums only at any time)
    - Annuity Growth Account (at outset only and three-year reviews)Phased investment can be set up by completing and returning a 'Phased investment request form'.
  7. For certain monthly plans, only units allocated up to the last policy anniversary may be switched. Subsequent allocations may be switched at the next anniversary.
  8. Please note that not all funds listed in our investment updates or on our website are available for all Canada Life products. Please contact our Customer Service team on **0345 6060708** for more information.
-



# Canada Life

Canada Life Limited, registered in England no. 973271. Registered office: Canada Life Place, Potters Bar, Hertfordshire EN6 5BA.  
Telephone: 0345 6060708 Fax: 01707 646088 [www.canadalife.co.uk](http://www.canadalife.co.uk) Member of the Association of British Insurers.

Canada Life Limited is authorised by the Prudential Regulation Authority and regulated by the Financial Conduct Authority and the Prudential Regulation Authority.



This paper is made from recycled materials

CSD18 – 216R