canada life

International™

Fund switch request

This form is only to be used for the Delta Account, Delta Discounted Trust Account, Flexible Life Plan (FLP)* and Offshore Savings Account (OSA) and is not suitable for facilitating adviser charges. Please use form 6995 'Starting or changing adviser charge deductions'.

Please complete in BLOCK CAPITALS. Please state the policy number(s) that this request applies to. Please see important notes overleaf.

Policyholder(s)	Policy number(s)

Please note that for regular premium contracts all future premiums will be paid into the new fund(s) selected. If you wish new premiums to be invested into an alternative fund selection, please complete a **Fund redirection request (reference 6989)**.

List the name(s) of the fund(s) and fund code(s) that you wish to switch out of (between 0% and 100%).

Fund code	Fund name to switch out from	% to switch out

List the name(s) of the fund(s) and fund code(s) that you wish to switch into totalling 100%.

Fund code	Fund name to switch into	% to switch in
	Total	100%

Please note that the overall percentage should add up to 100%

* Maximum of 4 funds for the FLP.

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

Full name (BLOCK CAPITALS)

Date (day, month, year) / /2

Signature

Policyholder ☐ Assignee* ☐
Trustee ☐ Fund adviser** ☐

Full name (BLOCK CAPITALS)

Date (day, month, year) / /2

Signature

Policyholder ☐ Assignee* ☐
Trustee ☐ Fund adviser** ☐

Full name (BLOCK CAPITALS)

Date (day, month, year) / /2

Signature

Policyholder ☐ Assignee* ☐
Trustee ☐ Fund adviser** ☐

Full name (BLOCK CAPITALS)

Date (day, month, year) / /2

Signature

Policyholder ☐ Assignee* ☐
Trustee ☐ Fund adviser** ☐

Important notes

1. Please clearly state the policy number(s).
2. All policyholders/trustees/assignees or their appointed fund adviser must sign this form.
3. The price date used will be the following working day's unit price.
4. Where a request form has been incorrectly or partially completed there may be a delay in processing the instruction.
5. **Instructions received after midday will be processed the next working day.**
6. Please refer to Canada Life International Limited website (www.canadalifeint.com) for fund codes and also to make sure all funds are open to new business.
7. Please note there is a maximum of four funds permitted on Flexible Life Plan policies. For all other policy types the maximum is 10 funds for each policy.
8. Suspended funds may not be switched.
9. Canada Life International Limited reserve the right not to issue a service standard payment, should there be processing delays due to incomplete/incorrect forms being issued.
10. The instruction can be processed on a copy however, the original wet ink must be issued to our office.

* Assignee – Where a policy is assigned or charged as security (for example, to a bank as security for a loan) the assignees consent or authorisation may be needed.

** Fund adviser – A suitably authorised individual, partnership, company or other body which is/are appointed by the policyholder(s) to make investment decisions (and provide instructions) on their behalf.

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Canada Life International Limited is an Isle of Man registered company authorised and regulated by the Isle of Man Financial Services Authority.