



Phased investment request

Policy owners or scheme name (you)

Policy number(s)

Phased investment is used to gradually move money from one group of funds to another over a defined period of time. This service is available for CanInvest Select Account, Flexible Investment Bond (FIB), Select Investment Bond (SIB), Total Access Bond (TAB), Trustee Investment Plan (TIP) there is no minimum fund value or switch amount.

If you wish to use this option you can select **one** of three choices;

1. Full option; move 100% of your nominated funds (complete section 1.1 only)
2. Partial option; move a specific percentage of your nominated funds (complete section 1.2 only)
3. Fixed amount option; move a specific monetary amount of your nominated funds (complete section 1.3 only)

In all cases, you must complete section 1.4

When you have decided which option to use, complete the relevant sections

Please note

1. The phased investment option will only apply to the policy number(s) confirmed above.
2. Certain events will cause the phased investment service to stop automatically. Please refer to your policy document for details of these events.
3. In the event that a fund is suspended, the phased investment service will stop automatically.
4. Once started, the frequency, timescale and funds chosen for your phased investment cannot be changed. To make any changes, you will need to cancel the existing phased investment and request a new one.
5. For TIP, phased investment can only be applied to single premium investments (not regular premiums).

1.1 Full option

Under this option we will switch 100% of your nominated funds. We will divide the amount across the frequency and timescale you select.

You can choose up to nine nominated funds to switch out of and up to nine selected funds to switch into but the combined total of funds must not be more than 10. For instance, you can switch from one nominated fund into nine selected funds (a total of 10) or switch from five nominated funds into five selected funds (a total of 10).

Nominated fund(s) to switch out of	Percentage	Selected fund(s) to switch into	Percentage
	100%		%
	100%		%
	100%		%
	100%		%
	100%		%
	100%		%
	100%		%
	100%		%
	100%		%
	100%		%
Total (must equal 100%)			%

1.2 Partial option

Under this option we will switch the percentage you specify from the funds you nominate. There is no minimum so you can switch any percentage you choose. You can switch different percentages from different funds. We will divide the amount chosen across the frequency and timescale you select.

You can choose up to nine nominated funds to switch out of and up to nine selected funds to switch into but the combined total of funds must not be more than 10. For instance, you can switch from one nominated fund into nine selected funds (a total of 10) or switch from five nominated funds into five selected funds (a total of 10).

Nominated fund(s) to switch out of	Percentage	Selected fund(s) to switch into	Percentage
	%		%
	%		%
	%		%
	%		%
	%		%
	%		%
	%		%
	%		%
	%		%
	%		%
Total (must equal 100%)			%

1.3 Fixed amount option

Under this option we will switch a fixed monetary amount, as selected by you, from the funds you nominate. There is no minimum so you can move any amount and you can switch different amounts from different funds. You then need to nominate the funds you want to switch into and specify the percentage selected you want each fund to receive. The amount you specify is the total amount you wish to move from the nominated fund. We will divide the amount chosen across the frequency and timescale you select.

You can choose up to nine nominated funds to switch out of and up to nine selected funds to switch into but the combined total of funds must not be more than 10. For instance, you can switch from one nominated fund into nine selected funds (a total of 10) or switch from five nominated funds into five selected funds (a total of 10).

Nominated fund(s) to switch out of	Amount	Selected fund(s) to switch into	Percentage
	£		%
	£		%
	£		%
	£		%
	£		%
	£		%
	£		%
	£		%
	£		%
	£		%
Total (must equal 100%)			%

1.4 Frequency and timescale

Note: The first switch will take place one month after this form has been received.

Please select the frequency:

Monthly Quarterly (every three months)

Please select the timescale over which you would like the switches to take place:

6 months 24 months

12 months 36 months

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

Full name (BLOCK CAPITALS)

Date (day, month, year)

Signature of owner

Policyholder Assignee*

Trustee Professional adviser**

Full name (BLOCK CAPITALS)

Date (day, month, year)

Signature of owner

Policyholder Assignee*

Trustee Professional adviser**

Full name (BLOCK CAPITALS)

Date (day, month, year)

Signature of owner

Policyholder Assignee*

Trustee Professional adviser**

Full name (BLOCK CAPITALS)

Date (day, month, year)

Signature of owner

Policyholder Assignee*

Trustee Professional adviser**

Please see next page for notes.

Important notes

1. Please clearly state your policy number for phased investment to be applied.
 2. Where phased investment has been requested, the value of the nominated fund(s) to switch out of will be re-allocated as per the selected funds and percentages under the option chosen.
 3. Incorrectly completed forms will be returned.
 4. The price date used for phased investment will be one calendar month from the date of receipt of this fully and correctly completed form. In the event this date falls on a weekend or bank holiday we will use the next available working day's price.
- * **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.
- ** **Professional adviser** – A suitably authorised individual, partnership, company or other body which is appointed by the policy owner(s) to make investment decisions (and provide instructions) on their behalf.

Contact details

- You should contact your professional adviser in the first instance.
- If you have any questions you can contact us in the following ways:

Phone: **0345 6060708** (lines are open Monday to Friday 9am – 5pm)

E-mail: Switches@canadalife.co.uk

Head office address:

**Switches
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Canada Life

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