

The Retirement Account

Fund switch/redirect/rebalance form

Name

Retirement Account number

This form should be completed and returned if you want to complete one or more of the following transactions:

- A) Switch from/to specific funds within your current investments
- B) Update your investment strategy/redirect future contributions
- C) Apply one-off rebalance
- D) Turn on or off auto-rebalance

An investment strategy is a group of funds that is used for future rebalancing or for future regular contributions.

How to return your form

By email

newbusiness.ra@canadalife.co.uk



By post

Customer Services Department
Canada Life
PO Box 4993
Worthing BN99 4AE



Part A**Switch from/to specific funds, within your current investments**

Switching units means that the value of your chosen units will be switched into your new fund choice.

Before making a decision you should read the Investment Fund Summary and The Retirement Account Technical Summary which are available on our website.

Is the switch to apply to:

- All of your Investment funds
- Your Pension Savings funds only
- Your Pension Drawdown funds only

(please contact us if there is more than one drawdown arrangement and you wish the switch to apply only to one).

**Please note**

Rebalancing switches between the investment funds in your Retirement Account to bring the proportional value of your investments broadly in line with the percentages that you specify. Therefore, you may find it is easier to use rebalancing than switching, in which case you should complete Part C and if necessary Part B instead.

**Please note**

This does not change your investment strategy (if you have one), so future contributions and rebalances will continue to use your current strategy. Please complete section B if you wish this to change.

Funds you want to switch from

Fund name	Fund ISIN*	% you want to switch

Funds you want to switch to

Fund name	Fund ISIN*	% you want to switch

Please note that switching of units cannot be backdated.

*Fund ISINs can be found via the Fund Research Centre on our website:
<https://fund-research-centre.canadalife.co.uk/investments>

Part D Auto-rebalance

Please tick if you would like to:

- Set up a regular auto-rebalance Turn off existing regular auto-rebalance

Note that if you haven't selected a new investment strategy in B) this will be into your existing investment strategy (if applicable).

If setting up a regular auto-rebalance please indicate the frequency:

- Monthly Quarterly Yearly

Please contact us if you want to start or stop auto-rebalance for just your Pension Savings or your Pension Drawdown arrangement(s).

Part E Other requirements/information

Signature

Date
(day, month, year)

--	--	--	--	--	--	--	--	--	--



Canada Life Limited is authorised by the Prudential Regulation Authority and regulated by the Financial Conduct Authority and the Prudential Regulation Authority. Registered in England and Wales no. 973271. Registered office: Canada Life Place, Potters Bar, Hertfordshire EN6 5BA. Canada Life Platform Limited, trading as Canada Life, is a subsidiary of The Canada Life Group (UK) Limited, and is authorised and regulated by the Financial Conduct Authority. Registered in England and Wales no. 8395855. Registered office: Canada Life Place, Potters Bar, Hertfordshire, EN6 5BA.