

First Bond Holder/Life Assured

Title (Mr/Mrs/Ms/Miss/other):

Forename(s): Surname:

Permanent Address: Tel:

Date of Birth:

Postcode: **All boxes must be completed**

Second Bond Holder/Life Assured

Title (Mr/Mrs/Ms/Miss/other):

Forename(s): Surname:

Permanent Address: Tel:

Date of Birth:

Postcode: **All boxes must be completed**

Switch Details

FROM: Existing Fund		Switch		TO: New Fund
<input type="text"/>	£	OR	%	<input type="text"/>
<input type="text"/>	£	OR	%	<input type="text"/>
<input type="text"/>	£	OR	%	<input type="text"/>

Switching Limits

- You are entitled to 3 "free" switches per policy year. All subsequent switches will incur a charge of £20.00 per switch.
- The minimum switch is £25,000 and the minimum from an individual fund is £10,000.
- The minimum remaining balance required in a fund following a switch is £50,000.

Please note: All completed Switch Request Forms received before 10am will be processed on the same working day. All completed Switch Request Forms received after 10am will be processed the following working day, without the inclusion of interest (i.e. Friday – Monday)

Declaration

I/We declare that I/We have read and understood the Flexible Asset Bond Key Features Document and that I/We understand the different risks associated with the funds selected. I/We hereby request that the instructions above are carried out in accordance with the Terms and Conditions of my/our Bond.

Signed by First Bondholder / Life Assured: Date: / /

Signed by Second Bondholder / Life Assured: Date: / /

Cardif Pinnacle is a trading style of Pinnacle Insurance plc.
Pinnacle Insurance plc is authorised and regulated by the Financial Services Authority

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