PCI

CHANGE OF INVESTMENT

Application form

This application form is for changing your investment choice under your Profitbuilder plan. This form may be used for all Profitbuilder plans.

Important information

Please read before completing this application form.

- Please use BLOCK CAPITALS and black ink when completing this form.
- For details of all the investment choices please refer to our website at royallondon.com
- We recommend you take financial advice before changing your investment choice, as selecting unsuitable investments may significantly reduce the value of your plan.
- If you need any help completing this form you can contact us on 0345 60 50 050 (Mon - Fri 8am – 6pm).
- On completion of this form, please return to **Royal London, Royal London House, Alderley Road, Wilmslow, Cheshire SK9 1PF.**

1 Personal information

This section should be completed by all applicants.

Name of first or only life assured

Name of second life assured

Policy number

Policyholder's contact telephone number

Policyholder's email address

Double Cover or Twin Plans (House Purchase only) can have different investment instructions for each plan. Separate forms should be completed in respect of each plan, as required.

If you wish this single set of instructions to be applied to both plans, please tick this box. ☐

The Second Double Cover/Twin Plan number should be entered here if you want this to apply to both plans:

Profitbuilder

2 New investment choice

This section should be completed to tell us what your new investment choice is.

You should tick one or both of the boxes below and then complete the relevant part.

I/We would like to:

- Switch existing investments ☐ **Please complete Part A**
- Switch future regular payments ☐ **Please complete Part B**

Part A: Switch existing investments

Complete Table 1 below if you want to switch out of some of the individual funds you are currently invested in. If you want to switch out of all of the funds you are currently invested in then tick this box instead. ☐

If you are currently invested in one of our Mortgage Investment Strategies and wish to exit the strategy, please tick this box. ☐

If you are transferring out of a Mortgage Investment Strategy, 100% of the fund must be transferred. There are also certain restrictions that may apply if you transfer out of a Mortgage Investment Strategy within 10 years of the maturity date.

Complete Table 2 with details of **all** the funds that you want your investments to be switched to.

Table 1: Funds to be switched from:

Fund name	Percentage (%)

Table 2: Funds to be switched to:

Fund name	Percentage (%)

Note: A market value reduction may be applied for switches out of the With Profits fund.

2 New investment choice continued

Part B: Switch future regular payments

If you are making future regular payments do you want your new fund selection as shown in Part A Table 2 to apply to these payments as well? Yes ☐ No ☐ Not applicable ☐

If 'No' please complete the table below to tell us what individual funds you would like your future regular payments to be invested in. The percentage split must add up to 100%.

Fund name	Percentage (%)	Fund name	Percentage (%)
Managed		European	
Global Managed		Fixed Interest	
Defensive Managed		Index Linked	
Worldwide		Deposit	
UK Equity		Property	
American		With Profits	
Pacific		**Total**	**100%**

Note: Certain restrictions may apply to redirections into the With Profits fund if requested within 10 years of the maturity date.

3 Declaration

The policyholder(s) or financial adviser should complete this section.

If the policyholder is giving the authorisation for the change in the investment choice then only Part (i) below needs completed. In the case of a joint life plan, or where these instructions are to apply to both plans under Double Cover/Twin Plan, both policyholders are required to sign.

If the financial adviser is changing the investments on behalf of the policyholder(s) then only Part (ii) below should be completed.

(i) Policyholder(s) authorisation

I/We apply to change the investment choice according to the instructions given in section 2.

I/We confirm that I/we have read the relevant factsheets for the investments I/we have chosen.

Signature (First life) ______ **Date** D D M M Y Y Y Y

Signature (Second life) ______ **Date** D D M M Y Y Y Y

(ii) Financial adviser authorisation

Signature ______ **Date** D D M M Y Y Y Y

FCA reference number ______

Royal London agency number ______

Telephone number ______

Note: If signed by a financial adviser on behalf of the policyholder(s), Royal London reserves the right to request a letter of instruction signed by the policyholder(s) giving details of the investments to be made. Alternatively, written authority to act upon the financial adviser's instructions can be provided by the policyholder(s). Royal London reserves the right not to accept instructions without this authority. **Please note it is the financial adviser's responsibility to ensure that instructions sent to Royal London correctly reflect the policyholder's wishes.**

Royal London
1 Thistle Street, Edinburgh EH2 1DG
royallondon.com

All literature about products that carry the Royal London brand is available in large print format on request to the Marketing Department at
Royal London, 1 Thistle Street, Edinburgh EH2 1DG.
All of our printed products are produced on stock which is from FSC® certified forests.

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