



Profitbuilder

Change of investment application form

You'll need to complete this application form if you'd like to change 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/onlineservice
- We recommend you speak to a financial adviser 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). Royal London is unable to provide you with financial advice, however we will be able to assist you in completing this form and answer any questions you may have.
- On completion of this form, please return to **Royal London House, Alderley Park, Congleton Road, Nether Alderley, Macclesfield, SK10 4EL**

1 Personal information

This section should be completed by all applicants.

Name of first or only life assured	<input type="text"/>
Name of second life assured	<input type="text"/>
Policy number	<input type="text"/>
Policyholder's contact telephone number	<input type="text"/>
Policyholder's email address	<input type="text"/>

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:

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		UK 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 had the opportunity to carefully read the **relevant factsheets** for the investments I/we have chosen.

Signature (First life)

Date

Signature (Second life)

Date

(ii) Financial adviser authorisation

Signature

Date

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
royallondon.com

We're happy to provide your documents in a different format, such as braille, large print or audio, just ask us when you get in touch.

This product is made of material from well-managed FSC®-certified forests, recycled materials, and other controlled sources.

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