

# Fund variation request

Application form



Please read the IMPORTANT NOTES before completing this Request. Please use BLOCK CAPITALS throughout.

To	Friends Life, Customer Services Department, PO BOX 1550, Salisbury SP1 2TW
Name of person(s) authorising this request	
Name of authorised firm (if applicable)	
Contact telephone number	
Policyholder name(s) if different from above	
Policy number(s)	

If you would like existing units to be reallocated please complete the section below.

**A Requested distribution of existing units**

I request Friends Life to switch the fund holding in the policy/policies numbered above into the funds listed below at the percentages shown. Please use whole percentages only.

Fund name	Percentage investment
Total 100%	

Please note that we will rebalance the total fund holdings so that the funds after the switch match your instructions above. If, instead of selecting fixed percentages, you would prefer to move investments within one or more existing funds to an alternative fund(s), please indicate this in the free format box below.

If you are unable to express your instructions in the above format, please give details here.

Policy number(s)	
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If you would like future payments to be reallocated, please complete the section below.

I request Friends Life to allocate future payments to the policy/policies numbered above to the funds listed below at the percentages shown. I wish this to be done at the next allocation of units after the date that Friends Life receives these instructions at the address on the previous page. Please use whole percentages only.

## C Declaration

Signature(s)

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Date

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## Signatures

- a the policyholder(s). If the policy is assigned or written under trust, it is the signatures of the assignees or the signatures of all the trustees that are required, unless the trust form specifically allows the person who set up the trust to vary funds acting alone.
- b someone authorised by every relevant person in (a) to give instructions on their behalf, such authorisation being given in a form of authority lodged with Friends Life.

The choice of links must be in accordance with the terms of your policy.

Any switching instructions will be carried out at the next published bid prices following receipt of this form, correctly completed and signed, at Friends Life's Salisbury Head Office, unless it is considered necessary to defer switching of units in accordance with the policy conditions.

Please note that where a customer switches out of With Profits Series 1 the 'guaranteed growth rate' of 3% will be lost, and customers will not be able to return to this series at a later date.

**Investment bonds:** The FP With Profits Fund is only offered under some policies. Where available the terms on which FP With Profits Fund units will be allocated or cancelled will depend on the series of units applicable to that policy.

**In all cases where a switch out of FP With Profits Fund units is possible, a Market Value Reduction (MVR) may apply to reduce the value of the units before the switch.**

If you have any queries regarding this fund variation form please contact your financial adviser or Friends Life.

Friends Life, PO Box 1550, Milford, Salisbury SP1 2TW. Telephone number 0845 602 9199.

**Friends Life Limited**

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**Telephone calls may be recorded.**

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