

Fund Switch and Monthly Contribution Redirection Form

- 1 Print and complete this form to switch the funds you invest in. Complete all fields in BLOCK CAPITALS and black ink.
- 2 Return to FREEPOST Foresters Financial, Forester Life, 2 Cromwell Avenue, Bromley BR2 9BF. No stamp required.
- 3 We will process the instruction, and inform you once this is complete.

1. Plan Information and Planholder's Details

Plan Number	<input type="text"/>									
Title and Forename(s)	<input type="text"/>									
Surname	<input type="text"/>									
Date of Birth	<table border="1" style="display: inline-table; border-collapse: collapse;"> <tr> <td>D</td><td>D</td><td>M</td><td>M</td><td>Y</td><td>Y</td><td>Y</td><td>Y</td> </tr> </table>	D	D	M	M	Y	Y	Y	Y	
D	D	M	M	Y	Y	Y	Y			
National Insurance number	<table border="1" style="display: inline-table; border-collapse: collapse;"> <tr> <td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td> </tr> </table>									
Address (permanent residence)	<div style="border: 1px solid black; height: 40px; width: 100%;"></div> <div style="text-align: right; margin-top: 5px;">Postcode</div>									

2. Registered Contact's Details (only for Child Trust Fund and Junior ISA if different from the above)

Title	<input type="text" value="Mr / Mrs / Miss / Ms / Other:"/>								
Forename(s)	<input type="text"/>								
Surname	<input type="text"/>								
Date of Birth	<table border="1" style="display: inline-table; border-collapse: collapse;"> <tr> <td>D</td><td>D</td><td>M</td><td>M</td><td>Y</td><td>Y</td><td>Y</td><td>Y</td> </tr> </table>	D	D	M	M	Y	Y	Y	Y
D	D	M	M	Y	Y	Y	Y		
Address (permanent residence)	<div style="border: 1px solid black; height: 40px; width: 100%;"></div> <div style="text-align: right; margin-top: 5px;">Postcode</div>								

3. Contact details

Telephone number (in the event of queries)	<input type="text"/>
Email address	<input type="text"/>



Enjoy the convenience of going paperless!

You will be set up to receive documents by email, if you have a MyPlans account you can view them online.

I want to opt out of the eco-friendly email option and receive documents by post: ☐



Stay connected with tailored updates

We may contact you about our products and services. Tick the boxes below to opt-in, you can opt-out anytime.

☒

Email

☒

SMS (text)

4. Fund switch for current Plan value

Complete this section if you would to change the fund(s) the Plan is currently invested in. It is important to read the Key Information Document (if applicable) or any other documentation about the fund before you make your choice. These can be found on [foresters.com](#)

Current funds Please list the fund(s) name and percentage of the existing funds that you wish to switch from		New funds Please list the fund(s) and percentage that you wish to switch to	
Fund name	%	Fund name	%

5. Fund switch for future contributions

Complete this section if you would like to change the fund(s) for any current and future monthly contributions to the Plan. It is important to read the Key Information Document (if applicable) or any other documentation about the fund before you make your choice. These can be found on [foresters.com](#)

Current funds (only complete if you have an existing Direct Debit(s)) Please list the fund(s) name and percentage of the existing monthly contribution that you wish to switch from		New funds Please list the fund(s) and percentage that you wish to switch to	
Fund name	%	Fund name	%

6. Using your personal information

We will use the data you provide to administer your Plan. For more information on the data we collect, why we collect it, how we use it for processing purposes and how we store your information, please visit [foresters.com/UKprivacy](#)

7. Declaration and Authority

I confirm that:

- I have read the notice regarding use of my personal information;
- I have not received any financial advice from a Forester Life Financial Adviser in respect to this fund switch
- the information provided by me in making this application is correct and to the best of my knowledge and belief.
- I am comfortable with the risks.

Signature of applicant	<div></div>	Date	<div></div>
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