

# Fund Switching Form – 28 day notice period applies

**How to fill out this form**

Please use black ink and CAPITAL LETTERS or tick  as necessary.

Any corrections must be initialled; do not use correction fluid.

Please note that a separate form is required for each plan

All the policies making up a plan will be switched identically unless you indicate otherwise\*

In case we need to contact you about your instructions.

Any switch will be applied in proportion to all of the units you hold in the fund(s).

The switch will take place using the price applicable 28 days after receipt of the instruction (or the next working day).

**About this form**

Only one switch may be requested each quarter. The quarter dates are 25 February, 25 May, 25 August and 25 November. The minimum partial switch is £500 and the minimum amount to be left in a fund after the switch is £500 (valued at the date the request is received). If you have any questions about this form, you can call us on **0345 640 1000** between 8am and 6pm Monday to Friday. Please send this completed form to: **PruFund Investment Plan Claims and Servicing, Prudential, Lancing BN15 8GB.**

**Plan details**

Plan/Policy No.

On the Life/Lives of

Your telephone No.

For your own benefit and protection, you need to read carefully the documentation provided before signing this form. You also need to read carefully any further documentation provided to you in the future. If there is anything you do not understand, please ask us for further information.

I/We, the legal owner(s) of this plan, request Prudential to switch existing units on the 28th calendar day (or the next working day if this is not a working day) following receipt of this form and apply the proceeds as detailed below.

I/We understand that once this switch request has been received by you I/We cannot withdraw or replace it.

**From \*\***

Indicate the fund(s) from which the “switch” is to be made and the percentage to be switched. If percentage is not given, 100% will be assumed.

Funds	tick	%
Growth		
Growth & Income		

**To**

Indicate the fund(s) from which the “switch” is to be made and the percentage to be switched. If percentage is not given, 100% will be assumed.

Funds	tick	%
Growth		
Growth & Income		

## How we use your personal information

For a copy of our latest Data Protection Notice, please visit [pru.co.uk/mydata](https://pru.co.uk/mydata). This details how and why we use your personal information (including any sensitive personal information), who we may share it with and your rights around your personal information. Alternatively, you can request a copy to be sent to you by writing to The Data Protection Officer, Customer Service Centre, Lancing BN15 8GB.

Please note that we collect personal information from you that is necessary for us to either provide you with the product or service you've requested or to comply with statutory or contractual requirements. Unfortunately if you don't provide all of the information we require this may mean we are unable to provide our products and services to you.

## Signature(s) of owner(s)

If a plan/policy is held in trust all the trustees must sign unless the trust provisions provide otherwise.

Following the switch a statement giving the details will be sent direct to the owner(s).

Owner 1

Date

D	D	M	M	Y	Y	Y	Y
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Please print name

Owner 2

Date

D	D	M	M	Y	Y	Y	Y
---	---	---	---	---	---	---	---

Please print name

Owner 3

Date

D	D	M	M	Y	Y	Y	Y
---	---	---	---	---	---	---	---

Please print name

Owner 4

Date

D	D	M	M	Y	Y	Y	Y
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Please print name

\* Please note that each set of identical policies is treated as a separate plan. If a switch only applies to some policies in a plan each set of policies after the switch will be administered separately including any policy fee when applicable.

\*\*Units can't be switched from the fixed rate funds (Growth Account and Growth and Income Account). A switch request can be made if the units are in a fixed rate fund and the 28 day notice period ends on or after the next quarter date.