

Switch and redirection checklist

Please use this checklist for all switch and redirection instructions on retail products.

If you would like to make a switch on a corporate policy then please contact your plan administrator or visit our website at www.zurichinternational.com

You can also contact the Zurich HelpPoint Corporate Team on the Isle of Man
Telephone: +44(0) 1624 691013 (00 971 436 34400 if dialling from the Middle East)

Fax: +44 (0)1624 691596 Email: corporate.pensions@zurich.com

Please ensure that you have completed and included all the correct information, so that we are able to process your instruction as quickly as possible.

Please tick to confirm that you have checked the following:

- The switch form has to be completed, where required, in **CAPITAL** letters and the instructions must be clear.
- Fund choices selected are available for your policy. Fund details can be found on our website at www.zurichinternational.com.
- The switch or redirection instruction does not exceed the maximum number of funds allowed for the policy.
Note: for Vista and InvestPlus policies (issued after January 2005) and for Futura, Global Choice, the International Wealth Account, the International Wealth Account flexible contribution plan, Lifelong, Wealth Accumulation Plan and SavingsPlus, you may hold a maximum of 30 funds at any one time. For all other policies, including Vista and InvestPlus policies issued prior to January 2005, you may hold a maximum of ten funds at any one time.
- The 'Switch to' total adds up to 100%.
- All policy owners/joint policy owners/trustees or authorised signatories have signed and dated the form where required.
- For switch forms signed by the financial professional on behalf of the client, please ensure a fund investment adviser (FIA) form is completed. (We require client authorisation on the FIA form prior to receipt of the switch form, otherwise we will be unable to process the switch).

Where to send your completed form and cut off times

Your area	Email address	Switch fax number	UK cut-off time*
Asia	switch_helppoint@zurich.com	+852 3018 7516	10.00am
Middle East	switch_helppoint@zurich.com	+971 4 363 7429	10.00am
All others	switch_helppoint@zurich.com	+44 1624 691055	10.00am

The email address above is for switch forms only – queries by email to this address will not be reviewed. If you do have any queries please contact:

Asia – helppoint.hk@zurich.com

Middle East – helppoint.uae@zurich.com

All others – client.services@zurich.com

*All cut-off times are UK time and are subject to change.

What happens now?

- Please note that the dealing date is determined by the date and time of receipt of the completed form in the relevant Zurich International Life (Zurich) office.
- If we receive your written switch request before 10am (United Kingdom time), the transaction will take place using the prices issued by fund managers for switch instructions submitted by us on the Isle of Man working day following acceptance of your switch request. Switches received on a Saturday or Sunday will be treated as if received on a Monday, or, where appropriate, the next available Isle of Man working day. If we receive your written request after 10am (United Kingdom time), the transaction will take place using the prices issued by fund managers for switch instructions submitted by us on the second Isle of Man working day following acceptance of your switch request.
- A switch confirmation letter will be forwarded via post detailing your requested change in funds.
- For clients and brokers with ZIO access, switch changes will be available online two days after the request is received.

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Member of the Singapore Financial Dispute Resolution Scheme.

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Calls may be recorded or monitored in order to offer additional security, resolve complaints and for training, administrative and quality purposes.

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Registered in the Isle of Man number 20126C.

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