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

<table>
<thead>
<tr>
<th>Your area</th>
<th>Email address</th>
<th>Switch fax number</th>
<th>UK cut-off time*</th>
</tr>
</thead>
<tbody>
<tr>
<td>Asia</td>
<td><a href="mailto:switch_helppoint@zurich.com">switch_helppoint@zurich.com</a></td>
<td>+852 3018 7516</td>
<td>10.00am</td>
</tr>
<tr>
<td>Middle East</td>
<td><a href="mailto:switch_helppoint@zurich.com">switch_helppoint@zurich.com</a></td>
<td>+971 4 363 7429</td>
<td>10.00am</td>
</tr>
<tr>
<td>All others</td>
<td><a href="mailto:switch_helppoint@zurich.com">switch_helppoint@zurich.com</a></td>
<td>+44 1624 691055</td>
<td>10.00am</td>
</tr>
</tbody>
</table>

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.
Zurich International Life Limited (Singapore branch) is licensed by the Monetary Authority of Singapore to conduct life insurance business in Singapore. Member of the Life Insurance Association of Singapore.

Member of the Singapore Financial Dispute Resolution Scheme.

Zurich International Life Limited is registered in Bahrain under Commercial Registration No. 17444 and is licensed as an Overseas Insurance Firm – Life Insurance by the Central Bank of Bahrain.

Zurich International Life Limited is authorised by the Qatar Financial Centre Regulatory Authority.

Zurich International Life Limited is registered (Registration No. 63) under UAE Federal Law Number 6 of 2007, and its activities in the UAE are governed by such law.

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

Zurich International Life is a business name of Zurich International Life Limited which provides life assurance, investment and protection products and is authorised by the Isle of Man Financial Services Authority.

Registered in the Isle of Man number 20126C.

Registered office: Zurich House, Isle of Man Business Park, Douglas, Isle of Man, IM2 2QZ, British Isles.

Telephone +44 1624 662266 Telefax +44 1624 662038.

Hong Kong office: 25-26F, One Island East, 18 Westlands Road, Island East, Hong Kong.

Telephone +852 3405 7150 Telefax +852 3405 7268.

Zurich International Life Limited acting through its Singapore branch at Singapore Land Tower #29-05, 50 Raffles Place, Singapore 048623. Telephone +65 6876 6750 Telefax +65 6876 6751.

Registered in Singapore No.T05FC6754E.

www.zurichinternational.com