

SWITCHING EXISTING INVESTMENTS

Please switch my/our units holding **FROM:**

Equity Funds			Fixed Interest Funds	Managed Funds			Deposit Funds	
UK Equity (JSG)	US Equity (JDP)	European Equity (JSE)	Global Fixed Interest (JSB)	Balanced Managed UK (JSL)	Balanced Managed (JDL)	Defensive Managed UK (JSS)	Sterling Deposit (JSC)	Dollar Deposit (JDC)

Please specify, in whole percentages, the percentage you wish to switch out of a fund.

TO:

Equity Funds			Fixed Interest Funds	Managed Funds			Deposit Funds	
UK Equity (JSG)	US Equity (JDP)	European Equity (JSE)	Global Fixed Interest (JSB)	Balanced Managed UK (JSL)	Balanced Managed (JDL)	Defensive Managed UK (JSS)	Sterling Deposit (JSC)	Dollar Deposit (JDC)

Please specify, in whole percentages, the new holding required, totaling 100%.

Please tick this box if any individual connected to the Policy (including any appointed Adviser, Policyholder/Trustee or family member/close associate of the same) is party to inside knowledge and privileged trading information in relation to the security/ies as listed above.

Policyholder 1

X

Policyholder 2

X

D	D	M	M	Y	Y	Y	Y
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Policyholder(s)	
Policy number	

Please forward your completed Switch Form by email to ask@monument.im

A switch received before 9.30am will be processed the same day. A switch request after this time will be processed the following working day.