



# SWITCH FORM

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You should use this form if you wish to switch some, or all, of your investment in our funds.

Personal information you provide on this form will be held and processed by us in accordance with the European General Data Protection Regulation, Irish data protection law and any applicable national privacy legislation. We need to collect this personal information so that we can carry out your instruction checks and in doing so carry out our contractual obligations.

See our **Protecting your personal information** leaflet which can be found on our website [www.athora.com/ie](http://www.athora.com/ie). It explains how we manage your personal information and provides details on your data protection rights, how long we will hold information on you, contact details of our Data Protection Officer should you have any queries or concerns and how you can contact the Irish Data Protection Commission. If you provide us with personal information relating to any other individual you must ensure that you have a lawful basis to

collect and process it. In completing this form, you confirm that you have provided any such individual with a copy of our **Protecting your personal information** leaflet and all other information that such an individual is legally entitled to under the European General Data Protection Regulation.

Please complete all relevant sections of this form in **BLOCK CAPITALS** using a ballpoint pen.

You can scan and email this form to [client.relations.ai@athora.com](mailto:client.relations.ai@athora.com)

Alternatively, you can send this form by airmail to:  
Athora Ireland plc  
2nd Floor  
IFSC House  
Custom House Quay  
Dublin  
D01 R2P9  
Ireland

## 1. POLICYHOLDER OR SCHEME DETAILS

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Policy number

Name(s) of policyholder(s) or scheme name


Phone number

Email address

## 2. INSTRUCTIONS TO SWITCH

### 2.1 Fund switch

Complete the sections below to instruct a switch of funds. If you hold a Secure Lifetime Income or 5 for Life plan and wish to invest in any of our Create range funds, please read the important notes in **section 2.2**.

**For the list of the funds available to you, you should refer to our website at [www.athora.com/ie](http://www.athora.com/ie)**

**Managed Risk Portfolios:** investments in this fund range may only be switched into another Managed Risk Portfolio fund.

If your policy currently includes any guarantees, the guarantee option fee may vary depending on the funds you're invested in. See your policy conditions for full details.

We'll apply these instructions as follows:

- For any instruction we receive before 12pm, we'll apply the unit price as at the following business day.
- For any instruction we receive at or after 12pm, we'll apply the unit price as at the second business day following receipt.

The unit price and therefore the value of your switch transaction won't be available until up to 3 business days after it's been placed.

**Sell from:**

Fund name(s)	Value of units*	Percentage of units (%)*	Number of units*

If you need more space for funds, use a separate piece of paper, include the fund name and switch details in the same format as above, and **sign and date it**.

\*Complete only one of these boxes per fund.

**To:**

Fund name(s)	Percentage (%)
<b>Total</b>	<b>100%</b>

## 2. INSTRUCTIONS TO SWITCH – CONTINUED

### 2.2 Create range funds – Secure Lifetime Income and 5 for Life only

You can only invest in the Create range of funds if it's stated in your policy conditions booklet.

There are restrictions on the amount that can be invested in each fund category. If you wish to invest in Category B funds, **you must have a specified minimum amount invested in Category A funds**. You should refer to your policy conditions for details.

**If you're invested in any Category B funds after this switch is completed, we'll carry out a rebalancing exercise. If the permitted investment limits are exceeded, we'll automatically switch the excess units from the Category B funds into Category A funds. We'll inform you if this occurs. Please see your policy conditions for further details.**

You can find out more about our funds on our website at [www.athora.com/ie](http://www.athora.com/ie)

## 3. AUTHORISATION

In this authorisation, 'I/We' means the policyholder or trustee and 'you' means Athora Ireland plc.

I/We authorise you to complete this switch instruction and acknowledge that you will not be responsible for any delay, or consequence of any delay, in completing the transaction where a third party caused that delay.

Date (dd/mm/yyyy)

Print name

Signature of policyholder or trustee

Print name

Signature of policyholder or trustee

Print name

Signature of policyholder or trustee

Print name

Signature of policyholder or trustee

