

# NFU MUTUAL CAPITAL INVESTMENT BOND

## FUND SWITCH FORM

### SECTION 1. PERSONAL DETAILS IF YOU WANT TO CHANGE YOUR INVESTMENT CHOICE

Please complete both pages of this form using **BLACK INK & BLOCK CAPITALS**.

Please send completed form to  
NFU Mutual - Customer Service  
(Financial Services)  
The Lakehouse  
Ryon Hill Business Park  
Warwick Road  
Stratford-upon-Avon  
Warwickshire  
CV37 0UU

If you have any questions about completing this form, please call us on **0800 622 323**

### SECTION 2. FUND SWITCH

A fund switch will use the prices that apply on the date we receive your written request.

We have the right to delay a fund switch for up to 3 months. We may also delay a fund switch, for up to 12 months, from a fund that has investments in freehold and leasehold property. If we delay a fund switch we will use the prices that apply for the date it takes place, rather than those which applied when we received your request.

A market value reduction might apply to a switch from the With-Profits fund. This is most likely to happen following a large fall in the stock market or after a sustained period of low investment returns. We will contact you before processing this request if this is the case.

Full name(s) of bond owner(s):

Existing bond number(s)

Contact number

Please switch my/our investment as follows:

Switch from:	% to be switched	Switch to:	% – see example below for guidance
Deposit		Deposit	
Fixed Interest		Fixed Interest	
International		International	
Mixed Portfolio 40-85% Shares		Mixed Portfolio 40-85% Shares	
UK Equity		UK Equity	
With-Profits (series 1)		With-Profits (series 1)	N/A
With-Profits (series 2)		With-Profits (series 2)	
<b>Total</b>			<b>100%</b>

If you want to switch 50% of your units in the With-Profits fund into the Mixed Portfolio 40-85% Shares Fund, you should enter 50% alongside 'With-Profits Fund' in the second column and 100% alongside 'Mixed Portfolio 40-85% Shares Fund' in the fourth column.

If you are invested in With-Profits series 1 (minimum annual bonus rate 3% guaranteed), you will be unable to switch back into the same series of the With-Profits fund at a later date.



**NFU Mutual**  
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**SECTION 3.**  
**NOTES/  
SIGNATURE(S)**

Bond holder(s) signature(s)

Full Name

Signature

Date

D	D	M	M	Y	Y	Y	Y
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Full Name

Signature

Date

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

Full Name

Signature

Date

D	D	M	M	Y	Y	Y	Y
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Full Name

Signature

Date

D	D	M	M	Y	Y	Y	Y
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The National Farmers Union Mutual Insurance Society Limited (No. 111982).  
Registered in England. Registered office: Tiddington Road, Stratford upon Avon, Warwickshire CV37 7BJ.  
Authorised by the Prudential Regulation Authority and regulated by the Financial Conduct Authority  
and the Prudential Regulation Authority.

For security and training purposes, telephone calls may be recorded and monitored.

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[nfumutual.co.uk](http://nfumutual.co.uk)