

# NFU MUTUAL SELECT INVESTMENT PLAN NFU MUTUAL SELECT ISA

## Fund Switch and/or Payment Redirection Form

### SECTION 1.

#### PERSONAL DETAILS

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

Completed forms should be sent to:

NFU Mutual Select  
Investments Limited,  
PO Box 376,  
Darlington,  
DL1 9RT

If you have any questions about completing the form, please call us on **0370 606 6462**

### SECTION 2.

#### FUND SWITCH

Use this section to switch funds for your current investment

#### EXAMPLE:

If you want to switch **50%** of your investment in the NFU Mutual Gilt and Corporate Bond fund into the NFU Mutual UK Growth Fund, you should write **'NFU Mutual Gilt and Corporate Bond Fund'** in the column under the heading **'Switch from'** and enter **50%** alongside in the second column, and then write **'NFU Mutual UK Growth Fund'** in the column under the heading **'Switch into'** and **100%** alongside in the fourth column.

Full name(s) of owner(s):

Client reference number

Type of plan (please tick relevant box) (✓) one box only:

Select ISA

Select Investment Plan

Address:



Postcode

Contact telephone number:

Please switch the funds for my/our investment as follows:

Switch from: Please list below the name(s) of the provider and fund name(s)	% of your holding in fund	Switch to: Please list below the name(s) of the provider and fund name(s)	% – see example left for guidance
		Total	100%

Do you wish to receive income generated by your investment? Yes  No

If you have answered 'No' any income will be automatically reinvested to buy additional units. If you have answered 'Yes', please provide full details overleaf of the bank/building society account to be credited.



## NFU Mutual

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**SECTION 3.**

**PAYMENT REDIRECTION**

Use this section to redirect your future payments.

Please redirect my/our future regular payments to the fund(s) listed below:

Fund Name	%
<b>Total</b>	<b>100%</b>

Do you wish to receive income generated by your investment?    Yes     No

If you have answered 'No' any income will be automatically reinvested to buy additional units. If you have answered 'Yes', please provide full details of the bank/building society account to be credited.

**SECTION 4.  
YOUR BANK ACCOUNT  
DETAIL FOR INCOME  
PAYMENTS**

If you wish to receive income generated, please complete this section and send us proof of ownership for the account as follows:

- a copy bank statement, or
- a cancelled cheque, or
- a paying-in slip

Name and address of bank/building society
Postcode

Name(s) of account holder(s)
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Bank or Building Society account number	<table style="width: 100%; border-collapse: collapse;"> <tr> <td style="border: 1px solid black; width: 20px; height: 20px;"> </td> <td style="border: 1px solid black; width: 20px; height: 20px;"> </td> <td style="border: 1px solid black; width: 20px; height: 20px;"> </td> <td style="border: 1px solid black; width: 20px; height: 20px;"> </td> <td style="border: 1px solid black; width: 20px; height: 20px;"> </td> <td style="border: 1px solid black; width: 20px; height: 20px;"> </td> <td style="border: 1px solid black; width: 20px; height: 20px;"> </td> <td style="border: 1px solid black; width: 20px; height: 20px;"> </td> </tr> </table>								
Branch Sort Code	<table style="width: 100%; border-collapse: collapse;"> <tr> <td style="border: 1px solid black; width: 20px; height: 20px;"> </td> <td style="border: 1px solid black; width: 20px; height: 20px;"> </td> <td style="border: 1px solid black; width: 10px; text-align: center;">-</td> <td style="border: 1px solid black; width: 20px; height: 20px;"> </td> <td style="border: 1px solid black; width: 20px; height: 20px;"> </td> <td style="border: 1px solid black; width: 10px; text-align: center;">-</td> <td style="border: 1px solid black; width: 20px; height: 20px;"> </td> <td style="border: 1px solid black; width: 20px; height: 20px;"> </td> </tr> </table>			-			-		
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**SECTION 5.**  
**NOTES/  
SIGNATURE(S)**  
Please return all  
pages to us.

All owners of this  
investment must  
sign this form.

**IMPORTANT NOTES:**

- Please read our current Supplementary Information Document for general information and minimum fund investment limits. Key information about each fund is contained in the Key Investor Information Document (KIID). You should read the KIID for each fund you are switching into.
- Your switch (if applicable) will be carried out using the fund prices calculated at the next valuation point following receipt of your request.
- For fund switches on Select Investment Plans, if you've made a profit on the money you invested in the fund you're switching from, you could be liable to capital gains tax. You have a yearly allowance, which can reduce the amount of capital gains tax you may have to pay, or remove it entirely. If you have any questions about this, please contact HM Revenue and Customs.
- The redirection of future payments (if applicable) will take place from the next payment due date so long as we receive this form at least 14 days beforehand.
- If you switch from a fund after a dividend has been announced but before the distribution has been paid (this period is referred to as ex-dividend), the distribution will be paid on the old fund based on your existing instructions.

I/we have read the latest key investor information document for each of the fund(s)  
I am/we are switching/redirection payments into.

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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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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**NFU Mutual**

NFU Mutual Select Investments Limited (No. 08049488). A member of the NFU Mutual group of companies.  
Registered in England. Registered office: Tiddington Road, Stratford upon Avon, Warwickshire CV37 7BJ.  
Authorised and regulated by the Financial Conduct Authority.  
**For security and training purposes, telephone calls may be recorded and monitored.**

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