

NFU MUTUAL FLEXIBLE RETIREMENT ACCOUNT

Fund Switch and Lifestyle Switching Strategy Form

SECTION 1. PERSONAL DETAILS

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

IMPORTANT NOTES

- Please fill in sections 1 and 4 in full and either or both of sections 2 and 3.
- There are restrictions that apply to fund switches. For details, please refer to your policy document (ref POL/FRA).

SECTION 2. FUND SWITCH

EXAMPLE:

If you want to switch 50% of your investment in the **Mixed Portfolio Max 100% Shares Fund** into the **Deposit Fund** you would enter 50% alongside **Mixed Portfolio Max 100% Shares Fund** in the 'second' column, and 100% alongside **Deposit Fund** in the 'fourth' column.

Account number to which this applies

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Surname

Forename(s)

Title

I apply to make the following change(s) to my plan

Switch from:	% of units to be switched	Switch to:	% see example on left for guidance (must total 100%)
Deposit		Deposit	
Fixed Interest		Fixed Interest	
Global Emerging Markets		Global Emerging Markets	
Index Linked		Index Linked	
International		International	
Mixed Portfolio 20-60% Shares		Mixed Portfolio 20-60% Shares	
Mixed Portfolio 40-85% Shares		Mixed Portfolio 40-85% Shares	
Mixed Portfolio Max 100% Shares		Mixed Portfolio Max 100% Shares	
Property		Property	
UK Equity		UK Equity	
UK Equity Income		UK Equity Income	
Total			100%



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SECTION 3.
LIFESTYLE SWITCHING STRATEGY CHANGE

Please fill in this section if you wish to change your previous lifestyle switching decision, or if you now want to select lifestyle switching on your Flexible Retirement Account.

Please tick one of the boxes below to choose which lifestyle switching strategy you want.

None Default Own choice

- If you've ticked 'None' to stop lifestyle switching after it's started, any amounts already switched will remain in your chosen target funds. If you wish to change this, please fill in section 2 on Page 1.
- If you've ticked 'Default' strategy, we'll gradually move your funds into the Deposit Fund (25%) and the Fixed Interest Fund (75%) during the 5 years before your target pension date.
- Please tick any applicable boxes below to tell us if there are any funds you don't want us to switch your investment from.

These funds will be ring-fenced.

Deposit Fixed Interest Global Emerging Markets
 Index Linked International Mixed Portfolio 20-60% Shares
 Mixed Portfolio 40-85% Shares Mixed Portfolio Max 100% Shares
 Property UK Equity UK Equity Income

- If you've ticked 'Own choice' to make your own lifestyle switching strategy choice, please fill in the table below to tell us which funds you want us to move your investments into before your target pension date.

Funds available	Target fund allocation
Deposit	%
Fixed Interest	%
Global Emerging Markets	%
Index Linked	%
International	%
Mixed Portfolio 20-60% Shares	%
Mixed Portfolio 40-85% Shares	%
Mixed Portfolio Max 100% Shares	%
Property	%
UK Equity	%
UK Equity Income	%
Total	100%

How many years before your target pension date do you want your lifestyle switching strategy to begin?

I would like lifestyle switching to begin years before my target pension date (lifestyle switching must be for a whole number of years).

SECTION 4.
**NOTES/
SIGNATURE(S)**
Please return all
pages to us.

IMPORTANT NOTES:

- 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 from the Property Fund for up to 12 months. We may also delay a fund switch from one of the other funds for up to 3 months. 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. We will not delay a fund switch where lifestyle switching has started.

I confirm that I've checked any answers in this application that aren't completed in my own handwriting, and they are correct.

Full Name

Signature

Date

If you are under 18 years of age (16 in Scotland) your parents or legal guardian must sign this application form on your behalf.

Name

Relationship



NFU Mutual

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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