

NFU MUTUAL SELECT INVESTMENTS FUND SWITCH AND/OR PAYMENT REDIRECTION FORM

Please complete one form for each product you hold

SECTION 1.
PERSONAL DETAILS

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

Completed forms should be sent to:

Financial Services
NFU Mutual
Tiddington Road
Stratford-upon-Avon
Warwickshire
CV37 7BJ

If you have any questions about completing the form, please call us on **0800 622323**

SECTION 2.
FUND SWITCH

Use this section to switch funds for your current investment

Income paid into my bank account is not available for NFU Mutual Select Pension Accumulation Plans.

Full name(s) of owner(s):

Plan number

Address:

Postcode

Contact telephone number:

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

Switch from: Fund name(s)	% of your holding in fund

Switch to: Fund name(s)	%	Tick one option for each fund chosen		
		Reinvest income	Pay income into my bank account	Pay income into product cash
	100%			



NFU Mutual
INSURANCE | PENSIONS | INVESTMENTS

SECTION 3.

PAYMENT REDIRECTION

Use this section to redirect your future payments.

Income paid into my bank account is not available for NFU Mutual Select Pension Accumulation Plans.

SECTION 4.

YOUR BANK ACCOUNT DETAIL FOR INCOME PAYMENTS

If you wish us to pay the income into your bank account, 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

You don't need to complete this section if you have already given us your account details.

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

Fund name(s)	%	Tick one option for each fund chosen		
		Reinvest income	Pay income into my bank account	Pay income into product cash
	100%			

Name of bank/building society:

Name(s) of account holder(s):

Bank or Building Society account number:

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Sort code:

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Reference number (if applicable):

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 Key Features Document for general information and minimum fund investment limits. Important 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.
- 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 or to pay any tax due, please contact HM Revenue and Customs. Tax rules can change and the exact tax treatment depends on individual circumstances.

- 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 seen the latest KIID for each of the fund(s) I am/we are switching/redirecting 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).
Authorised and regulated by the Financial Conduct Authority. Registered in England.
Registered office: Tiddington Road, Stratford upon Avon, Warwickshire, CV37 7BJ.

To find out more about how we use your personal information and your rights,
please view the privacy policy on our website.

ALT-MSIL-0425

nfumutual.co.uk

