

# NFU MUTUAL SELECT INVESTMENTS INDEXATION 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. REGULAR WITHDRAWALS

Please tell us the current amount you receive and how often you receive it to help us identify your change.

Then tell us the amount of yearly indexation you would like to apply on future withdrawals. If you would like to remove the indexation, write 0.

## SECTION 3. REGULAR PAYMENTS IN

Please tell us the current amount you pay us and how often you pay it to help us identify your change.

Then tell us the amount of yearly indexation you would like to apply on future payments. If you would like to remove indexation, write 0.

Full name(s) of owner(s):

Plan number:

Address:

Contact telephone number:

## PLEASE SET UP/AMEND MY/OUR REGULAR WITHDRAWALS ON MY/OUR INVESTMENT AS FOLLOWS:

Current regular withdrawal amount:

Current withdrawal frequency:

Percentage of indexation to apply:

Frequency of withdrawals to apply:

## IMPORTANT NOTE:

The change will apply from the next withdrawal date, provided this form is received 10 working days before this date.

## PLEASE AMEND MY/OUR REGULAR PAYMENTS IN ON MY/OUR INVESTMENT AS FOLLOWS:

Current regular payment in amount:

Current frequency of payments:

Percentage of indexation to apply:

## IMPORTANT NOTE:

The change will apply on the next regular payment in, provided this form is received 15 working days before the payment is due to be made.



**NFU Mutual**  
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## SECTION 4.

### NOTES/SIGNATURE(S)

All owners of this investment must sign this form.

### IMPORTANT NOTE FOR REGULAR WITHDRAWALS:

For the Select Investment Plan, if you've made a profit on the money you invested in the fund(s) you're selling, 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.

Full name	<input type="text"/>										
Signature	<input type="text"/>			Date	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Full name	<input type="text"/>										
Signature	<input type="text"/>			Date	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Full name	<input type="text"/>										
Signature	<input type="text"/>			Date	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Full name	<input type="text"/>										
Signature	<input type="text"/>			Date	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>



NFU Mutual

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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.

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