



SWITCH FORM

You should use this form if you wish to switch some, or all, of your investment in our funds.

Personal information you provide on this form will be held and processed by us in accordance with the European General Data Protection Regulation, Irish data protection law and any applicable national privacy legislation. We need to collect this personal information so that we can carry out your instruction checks and in doing so carry out our contractual obligations.

See our **Data Privacy Notice** which can be found on our website www.monumentregroup.com/guarantees/ It explains how we manage your personal information and provides details on your data protection rights, how long we will hold information on you, contact details of our Data Protection Officer should you have any queries or concerns and how you can contact the Irish Data Protection Commission. If you provide us with personal information relating to any other individual you must ensure that you have a lawful basis to

collect and process it. In completing this form, you confirm that you have provided any such individual with a copy of our **Data Privacy Notice** and all other information that such an individual is legally entitled to under the European General Data Protection Regulation.

Please complete all relevant sections of this form in **BLOCK CAPITALS** using a ballpoint pen.

You can scan and email this form to **guarantees@va.monumentinsurance.com**

Alternatively, you can send this form by airmail to:
Monument Life Insurance dac
Bishop's Square
Redmond's Hill
Dublin 2
D02 TD99
Ireland

1. POLICYHOLDER OR SCHEME DETAILS

Policy number

Phone number

Name(s) of policyholder(s) or scheme name

Email address

2. INSTRUCTIONS TO SWITCH

2.1 Fund switch

Complete the sections below to instruct a switch of funds. If you hold a Secure Lifetime Income or 5 for Life plan and wish to invest in any of our Create range funds, please read the important notes in **section 2.2**.

For the list of funds available to you, you should refer to our website at www.monumentregroup.com/guarantees

Managed Risk Portfolios: investments in this fund range may only be switched into another Managed Risk Portfolio fund.

If your policy currently includes any guarantees, the guarantee option fee may vary depending on the funds you're invested in. See your policy conditions for full details.

We'll apply these instructions as follows:

- For any instruction we receive before 12pm, we'll apply the unit price as at the following business day.
- For any instruction we receive at or after 12pm, we'll apply the unit price as at the second business day following receipt.

The unit price and therefore the value of your switch transaction won't be available until up to 3 business days after it's been placed.

Sell from:

Fund name(s)	Value of units*	Percentage of units (%)*

If you need more space for funds, use a separate piece of paper, include the fund name and switch details in the same format as above, and **sign and date it**.

*Complete only one of these boxes per fund.

To:

Fund name(s)	Percentage (%)
Total	100%

2. INSTRUCTIONS TO SWITCH – CONTINUED

2.2 Create range funds – Secure Lifetime Income and 5 for Life only

IMPORTANT NOTES: Please read the following notes carefully if you are invested in a 5 for Life or Secure Lifetime Income policy.

- You can only invest in the Create range of funds if it's stated in your policy conditions booklet.
- There are restrictions on the amount that can be invested in each fund category. If you wish to invest in Category B funds, **you must have a specified minimum amount invested in Category A funds.** You should refer to your policy conditions for details.
- If you're invested in any **Category B** funds after this switch is completed, **we'll carry out a rebalancing exercise.** If the permitted investment limits are exceeded, **we'll automatically switch the excess units from the Category B funds into Category A funds.** We'll inform you if this occurs. Please see your policy conditions for further details.

You can find out more about our funds on our website at www.monumentgroup.com/guarantees/

3. AUTHORISATION

In this authorisation, 'I/We' means the policyholder or trustee and 'you' means Monument Life Insurance dac.

I/We authorise you to complete this switch instruction and acknowledge that you will not be responsible for any delay, or consequence of any delay, in completing the transaction where a third party caused that delay.

Date (dd/mm/yyyy)

Print name

Signature of policyholder or trustee

Print name

Signature of policyholder or trustee

Print name

Signature of policyholder or trustee

Print name

Signature of policyholder or trustee

 

Monument Life Insurance dac is registered in Ireland number 325795 with its registered office at 2 Park Place, Ground Floor, Upper Hatch Street, Dublin 2, Ireland and is regulated by the Central Bank of Ireland and subject to limited regulation by the Financial Conduct Authority and the Prudential Regulation Authority.