

This switch form is suitable for use with the following investment bonds:

Select Investment
Portfolio (Step Down & Level)
Co-operative Investment Bond
Norwich Union Flexibond (Post October 2000)
Norwich Union Bond 2000 (Post October 2000)
Norwich Union Portfolio Bond (Post October 2000)
GA Escalator Investment Bond (only % switches are allowed)
GA Investment Bond
CGU Portfolio Bond
GA Portfolio Bond
PM Investment Bond

Important notes on completing this form

Before you complete this form, please ask your financial adviser about funds currently available for switching. If you don't have an adviser, you can find one at unbiased.co.uk (remember there may be a charge for any advice). Alternatively, go to our fund centre at aviva.co.uk/retirement/fund-centre/. Please note that different funds have different risks associated with them. You should always consider the type of fund you are invested in and the associated risks – for the latest information about your chosen fund(s) please visit our fund centre at aviva.co.uk/funds, where you can also download the latest fund factsheet. Please note that fund objectives, risk ratings and charges of individual funds can change over time.

If you have chosen an income fund or where you wish to receive regular withdrawals please complete the regular withdrawals form.

For the following products, you can invest in up to 10 funds at any one time:

Select Investment
Portfolio (Step Down & Level)
Co-operative Investment Bond
Norwich Union Flexibond (Post October 2000)
Norwich Union Bond 2000 (Post October 2000)
Norwich Union Portfolio Bond (Post October 2000)

For the following products, you can invest in up to 6 funds at any one time:

GA Escalator Investment Bond
GA Investment Bond
CGU Portfolio Bond
GA Portfolio Bond

For the following product, you can invest in all available PM funds:

PM Investment Bond

Please write in the boxes provided in **black ink** using BLOCK CAPITALS and use a tick (✓) for any tick boxes

Please also remember to sign the form before you send it back to us.

If an agent has been authorised to make switching requests, this application should be signed by that agent, who must also have submitted a form of switching authorisation signed by the policyholder(s).

A copy of the terms and conditions applicable to your policy and/or your completed application form is available on request.

Trust cases - If the policy is written under trust, the trustees should sign this form and they should satisfy themselves that any switch is in accordance with the terms of the trust and is not in breach of any trust powers. If in doubt we would recommend that the trustees take independent legal advice. Aviva cannot be held responsible in such circumstances.

Unless you have been instructed otherwise your completed switch form should be returned to **PO BOX 520 Norwich NR1 3WG**.

Important notes about fund switching

- Fund objectives, risk ratings and charges of individual funds can change over time – so to check the latest information about your chosen fund(s) please visit our fund centre at aviva.co.uk/retirement/fund-centre/ and download the latest fund factsheet.
- In certain circumstances we may need to delay switching your funds as outlined in your plan terms and conditions. This could be as a result of adverse market conditions or where it would lead to the unfair treatment of other investors. The delay may be up to one month for most funds or up to six months if the fund you're invested in cannot be easily converted to cash. This includes: a property fund or a fund that's fully or partly invested in the form of land or buildings. After such a delay in switching the unit price used will be the price applicable at the end of the deferred period.
- If your request is sent by fax or courier or any other form of instant communication, is received after 5pm on any working day, or involves switching into or out of a fund which is subject to additional switching restrictions, then we may use unit prices up to two working days later when actioning your request. The switch confirmation letter we send you will confirm the effective date of the switch.
- If you're taking fund specific ongoing adviser charges, and you choose to switch out of a fund from which the charges are taken, you need to let us know which funds you would like your charges to now be taken from. If we don't hear from you, following the switch we'll start to take your ongoing adviser charges proportionally across all funds.
- Copy of the terms and conditions and /or completed application form is available on request

- **With-profits funds** – If you're switching in or out of with-profits please note the following points before signing this form:

For switches into with-profits funds the maximum investment is £1m. Where you already invest in, and intend to switch into a with-profits fund, you can't increase the value invested in with-profits funds to over £1m.

We may apply a market value reduction (MVR) if you switch money out of a with-profits fund which would reduce the monetary value that is switched to the chosen fund. This is to make sure customers remaining in the With-Profit Fund are not disadvantaged when others leave. We only apply MVRs following a large or sustained fall in stockmarkets or when investment returns are below the level we normally expect.

To find out the current position on whether a market value reduction applies phone us on 0800 068 6800.

Smooth Managed Fund - Only available on Select Investment and Portfolio (Step Down and Level) via a Financial Adviser. For switches into the Smooth Managed Fund the maximum investment is £1m. Please ask your Financial Adviser for a copy of the current terms and conditions for your product.

Please note that switches in and out of the Smooth Managed Fund are limited to one switch in each calendar quarter (i.e. 1 January - 31 March, 1 April - 31 June, 1 July - 30 September, 1 October - 31 December).

Policy number

Personal details

First policyholder/investing trustee

Surname	<input type="text"/>	Title	<input type="text"/>
Forenames	<input type="text"/>		
Email	<input type="text"/>		

Second policyholder/investing trustee (if any)

Surname	<input type="text"/>	Title	<input type="text"/>
Forenames	<input type="text"/>		
Email	<input type="text"/>		

Third investing trustee

Surname	<input type="text"/>	Title	<input type="text"/>
Forenames	<input type="text"/>		
Email	<input type="text"/>		

Fourth investing trustee (if any)

Surname	<input type="text"/>	Title	<input type="text"/>
Forenames	<input type="text"/>		
Email	<input type="text"/>		

Switching requirements

Examples

Switching between funds

You currently invest in the With-Profit and Deposit funds. You wish to switch 50% of the value of your holding in the With-Profit Fund and all of the value of your holding in the Deposit Fund into the Mixed Investment (20-60% Shares) and Mixed Investment (40-85% Shares), to be split equally.

Switch from		
Fund name	% of current fund value	OR amount (£)
Aviva With-Profit 2	50%	
Aviva Deposit	100%	
TOTALS		£

Switch to		
Fund name	% of current fund value	OR amount (£)
Aviva Mixed Investment (20-60% Shares)	50%	
Aviva Mixed Investment (40-85% Shares)	50%	
TOTALS		£

Switch from		
Fund name	% of current fund value	OR amount (£)
1		
2		
3		
4		
5		
6		
7		
8		
9		
10		
TOTALS		£

Complete only if each fund selected shows an actual amount

These two amounts must be the same (if completed)

Switch to		
Fund name	% of current fund value	OR amount (£)
1		
2		
3		
4		
5		
6		
7		
8		
9		
10		
TOTALS	100%	£

This column **must** total 100%. EXAMPLE: If you wished to switch 25% from Mixed Investment (40-85% Shares) equally into UK Equity Fund and Property Fund you would show 50% of switched value alongside each 'switch to' fund.

Declaration

Declaration by each policyholder/investing trustee

- I/we instruct Aviva to switch my/our investment between funds in accordance with my/our fund selection set out in the section headed "Switching requirements".
- I/We understand that my bond terms and conditions apply and that the switch will take place in accordance with the policy terms and conditions and may not be available in certain circumstances.
- I/We have read the objectives of the fund (s) into which I am/we are switching, and confirm that I/we accept any additional risks and fund charges that may apply as a result of this switch.
- I/we understand that if I/we switch into the Guaranteed 100 Fund or the Guaranteed 90 Fund, the guaranteed minimum value on the guarantee date, and the minimum death benefit, will be based on a percentage of the value of my/our investment in the fund on the effective date of the switch. The percentage applied will vary depending on which of the Guaranteed Funds I/we have chosen to switch into.

Signature(s)

First policyholder/investing trustee Signature

Date

Day	Month	Year		

Second policyholder/investing trustee (if any) Signature

Date

Day	Month	Year		

Third investing trustee (if any) Signature

Date

Day	Month	Year		

Fourth investing trustee (if any) Signature

Date

Day	Month	Year		

Personal Information

We collect and use personal information about you so that we can provide you with a policy that suits your needs. This notice explains the most important aspects of how we use your information but you can get more information about the terms we use and view our full privacy policy at www.aviva.co.uk/privacypolicy or request a copy by writing to us at:

Aviva, Freepost, Mailing Exclusion Team, Unit 5, Wanlip Road Ind Est, Syston, Leicester, LE7 1PD

The data controller(s) responsible for this personal information is Aviva Life & Pensions UK Ltd as the provider of your policy.

Personal information we collect and how we use it

We will use personal information collected from you and obtained from other sources:

- To provide you with your policy: we need this to administer your policy;
- To support legitimate interests that we have as a business:
 - We need this to detect and prevent fraud
 - We also use personal information about you to help us better understand our customers and improve our customer engagement. This includes profiling and customer analytics which allows us to make certain predictions and assumptions about your interests, make correlations about our customers to improve our products and to suggest other products which may be relevant or of interest to customers, which includes marketing products and services to you
- To meet any applicable legal or regulatory obligations: we need this to meet compliance requirements with our regulators (e.g. Financial Conduct Authority), to comply with law enforcement and to manage legal claims; and
- To carry out other activities that are in the public interest: for example we may need to use personal information to carry out anti-money laundering checks.

The personal information we collect and use will include name, address, date of birth and financial information. We may also need to ask for details relating to your health. We recognise that information about health is particularly sensitive information. Where appropriate, we will ask for consent to collect and use this information.

If we need your consent to use personal information, we will make this clear to you when you complete an application or submit a claim. If you give us consent to using personal information, you are free to withdraw this at any time by contacting us. Please note that if consent to use information is withdrawn we may not be able to continue to provide the policy or process claims and we may need to cancel the policy. Of course, you don't have to provide us with any personal information, but if you don't provide the information we need we may not be able to proceed with your application.

Other third parties may also provide information and this can include information already held about you within the Aviva group, information we obtain from publicly available records, our trusted third parties and from industry databases, including fraud prevention agencies and databases.

How we share your personal information with others

We may share your personal information:

- With the Aviva group, our agents and third parties who provide services to us, to help us administer our products and services;
- With regulatory bodies and law enforcement bodies, including the police, e.g. if we are required to do so to comply with a relevant legal or regulatory obligation;
- With other organisations including insurers, public bodies and the police (either directly or using shared databases) for fraud prevention and detection purposes

Some of the organisations we share information with may be located outside of the European Economic Area ("EEA"). We'll always take steps to ensure that any transfer of information outside of Europe is carefully managed to protect your privacy rights. For more information on this please see our Privacy Policy or contact us.

Marketing

We also use personal information we hold about you across the Aviva Group to help us identify and tailor products and services that may be of interest to you. We will only communicate with you in accordance with any marketing preferences you have provided to us. We will continue to do this after your policy has ended.

If you wish to amend your marketing preferences, change how you would like us to communicate with you, or tell us to stop marketing to you, you can do so in the following ways:

Update in MyAviva

By phone: 01603 622200

By email: contactus@aviva.com

By Post : Aviva, Freepost, Mailing Exclusion Team, Unit 5, Wanlip Road Ind Est, Syston, Leicester, LE7 1PD

To see how you can change your preferences in MyAviva or view your choices for online advertising visit our full privacy policy at www.aviva.co.uk/privacypolicy.

How long we keep your personal information for

We maintain a retention policy to ensure we only keep personal information for as long as we reasonably need it for the purposes explained in this notice. We need to keep information for the period necessary to administer your policy and deal with queries on your policy. We may also need to keep information after our relationship with you has ended, for example to ensure we have an accurate record in the event of any complaints or challenges, carry out relevant fraud checks, or where we are required to do so for legal, regulatory or tax purposes.

Your rights

You have various rights in relation to your personal information, including the right to request access to your personal information, correct any mistakes on our records, erase or restrict records where they are no longer required, object to use of personal information where this use is based on our legitimate business interests, ask not to be subject to automated decision making if the decision produces legal or other significant effects on you, and data portability. For more details in relation to your rights, including how to exercise them, please see our full privacy policy or contact us.

Contacting us

If you have any questions about how we use personal information, or if you want to exercise your rights stated above, please contact our Data Protection Officer by writing to them at Data Protection Officer, Aviva, Level 4, Pitheavlis, Perth, PH2 0NH.

If you have a complaint or concern about how we use your personal information, please contact us in the first instance and we will attempt to resolve the issue as soon as possible. You also have the right to lodge a complaint with the Information Commissioner's Office at any time.

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