

OEIC/ISA

REQUEST TO SWITCH BETWEEN FUNDS
AND/OR REDIRECT REGULAR CONTRIBUTIONS

FOR OFFICE USE ONLY									
Campaign Code									
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Please complete in BLOCK capitals and tick boxes where appropriate.

You should complete this form if you would like to switch some or all of the shares you currently hold to shares in another fund or funds and/or redirect future regular contributions. Please read the notes overleaf carefully before completing this form.

1. YOUR DETAILS

Name(s) in full (BLOCK capitals)

Account Number

2. DETAILS OF SWITCH

A charge may apply to switches between funds. Please note that the ongoing management charges for your new fund selection may differ from your existing fund selection. Please refer to the Key Investor Information Document(s) and the Supplementary Investor Information Document for more information, including details of the funds available, their aims and risks.

Please cancel shares currently invested as shown in Section A and re-allocate the proceeds as shown in Section B. An example of how to complete the table is shown.

Section A		Section B	
Name(s) of fund(s) you want to switch out of	Percentage (%) OR Value (£) of shares to be switched out of the fund	Name(s) of fund(s) you want to switch into	Percentage of the total amount switched (%) OR amount (£) to be invested in each fund (after deduction of charges)
Total			

Example

Mr Smith's ISA is currently invested in the Scottish Widows High Income Bond Fund and the International Bond Fund. He wants to move all the shares in these funds into the Balanced Growth Fund.

Section A		Section B	
Name(s) of fund(s) you want to switch out of	Percentage (%) OR Value (£) of shares to be switched out of the fund	Name(s) of fund(s) you want to switch into	Percentage of the total amount switched (%) OR amount (£) to be invested in each fund (after deduction of charges)
High Income Bond Fund	100%	Balanced Growth Fund	100%
International Bond Fund	100%		
Total			

3. REDIRECTION OF FUTURE REGULAR CONTRIBUTIONS

If you pay regular contributions and wish future contributions to be invested in a different fund selection, please complete this section. Please ensure all future regular contributions are invested into the following fund(s). I understand that I do not need to change my/our existing direct debit instruction.

Name(s) of fund(s) where you want your regular contributions invested	Percentage (%) to be invested in each fund
Total	100%

4. DECLARATION

I/we confirm that I/we have seen the latest version of the Key Investor Information Documents, and I/we have printed a copy or I/we have saved an electronic version of the documents.

This form will only be accepted if signed by all interested parties. If it has not been completed correctly, your request will be delayed.

Account holder(s) signature(s)

1.	3.
Date (DD MM YYYY) <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>	Date (DD MM YYYY) <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>
2.	4.
Date (DD MM YYYY) <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>	Date (DD MM YYYY) <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>

This form should be returned to:
Scottish Widows Unit Trust Managers Ltd, 15 Dalkeith Road, Edinburgh EH16 5WL

IMPORTANT NOTES

1. Before you complete the form, please read the Key Investor Information Document(s) (KIID) relating to the investment and the Supplementary Investor Information Document (including the Plan Conditions) (SIID). These documents replace Key Features/Simplified Prospectus and provide details about your investment and the fund(s) that you have chosen. If you see any reference to the Key Features Document in any of the material that we send you, please refer to the KIID and SIID instead.
2. This form must be completed by the legal owner(s) of the OEIC/ISA.
3. We may change the selection of funds that we make available. There may be restrictions on the amount you can invest in certain funds.
4. A switch within an OEIC is regarded as a disposal for Capital Gains Tax (CGT) purposes so a CGT liability may arise. Refer to the SIID for more details.
5. If you wish to change from Income shares to Accumulation shares, or vice versa, please let us know when you send us this form.

If you need more information, please contact your financial adviser.

Scottish Widows Unit Trust Managers Limited. Registered in England and Wales No. 1629925.
Registered Office in the United Kingdom at Charlton Place, Andover, Hampshire SP10 1RE. Tel: 0845 300 2244.
Authorised and regulated by the Financial Conduct Authority. Financial Services Register number 122129.

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