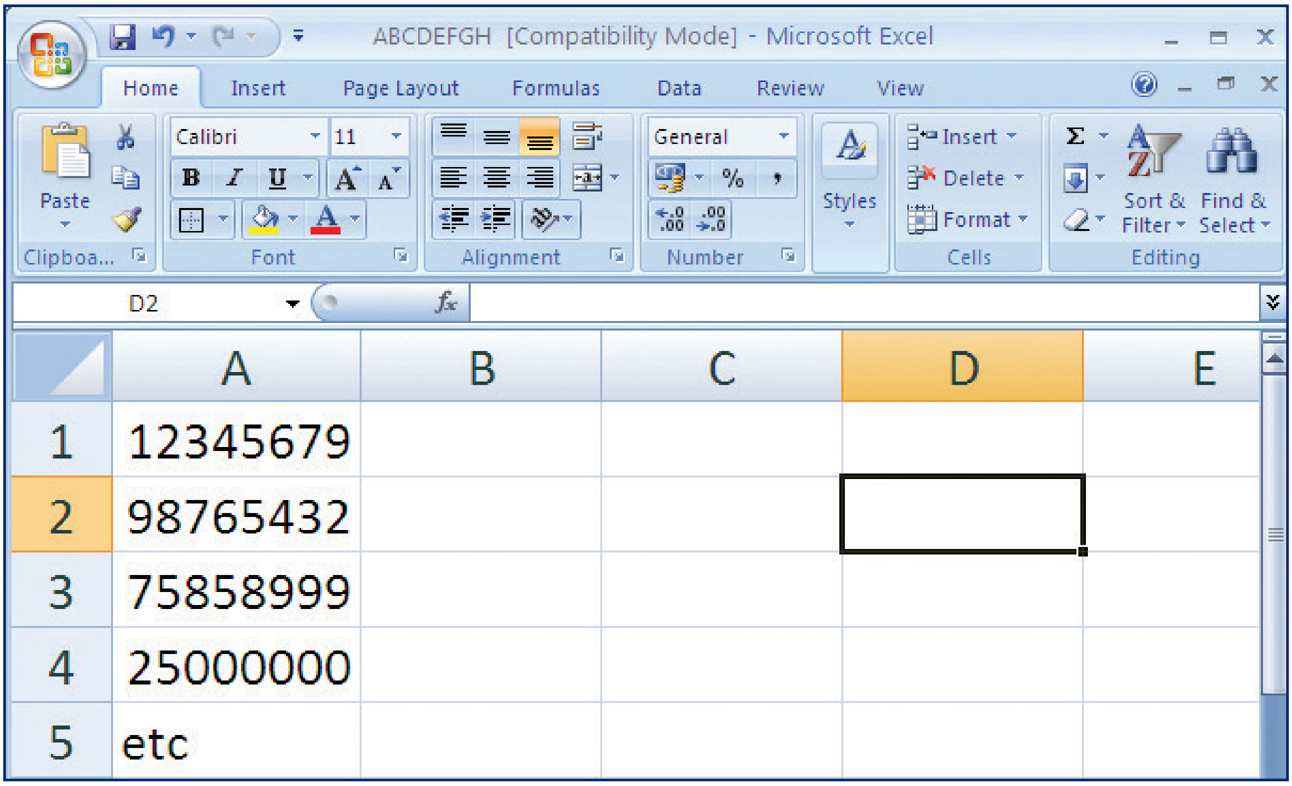
Group switch and redirection help guide

This guide is for your reference and is not to be returned with the switch form. Any unclear instructions on the form will not be performed. Please check that all the funds you have selected are available before emailing the form to us. Group switching only applies for Global Choice, International Wealth Account, International Wealth Account flexible contribution plan, InvestPlus, Harvester, Elite International Bond, Vista, SavingsPlus and Wealth Accumulation Plan. Please note that not all products are available in all regions.

How to complete your group switch instruction

1. Create a spreadsheet using a unique identification, made up of any numbers or characters meaningful to you (please do not use the file name given below as this is just an example). In this spreadsheet, list all the policies you want to switch. Remember to keep the format simple – no colours, shading or anything other than numeric characters.



2. Complete the group switch instruction form and save a copy, using the **same name** as your spreadsheet. Using the same name allows us to ensure that the right instruction is carried out against the right policies:

1 All fields must be completed

Date 1 9 0 2 2 0 1 5 Group switch ID A B C D E F G H

Fund investment adviser group name **THE FIA COMPANY**

Fund investment adviser group code 7 8 2 4 6 8 8 8 0 0

Number of policies in the 'Group switch excel template' **25**

If you don't know or have forgotten your fund investment adviser group code, please contact your usual Zurich representative.

2 Switch present fund holding to new fund holding

3 Redirect future payments

Sell from present fund holding/Switch from: Five character fund code					%	Buy into new fund holding/Switch to: Five character fund code					% (For example 10.00%)	Invest future payments into: Five character fund code					% (For example 10.00%)
A	B	U	S	D	50.00	F	G	U	S	D	100.00						
D	E	U	S	D	50.00												

Please make sure you specify the funds in the 'switch from' column. If this is not completed, then all funds will be switched.

4 Insert a scan of the fund investment adviser signature here

Name of fund investment adviser who's scanned signature has been inserted

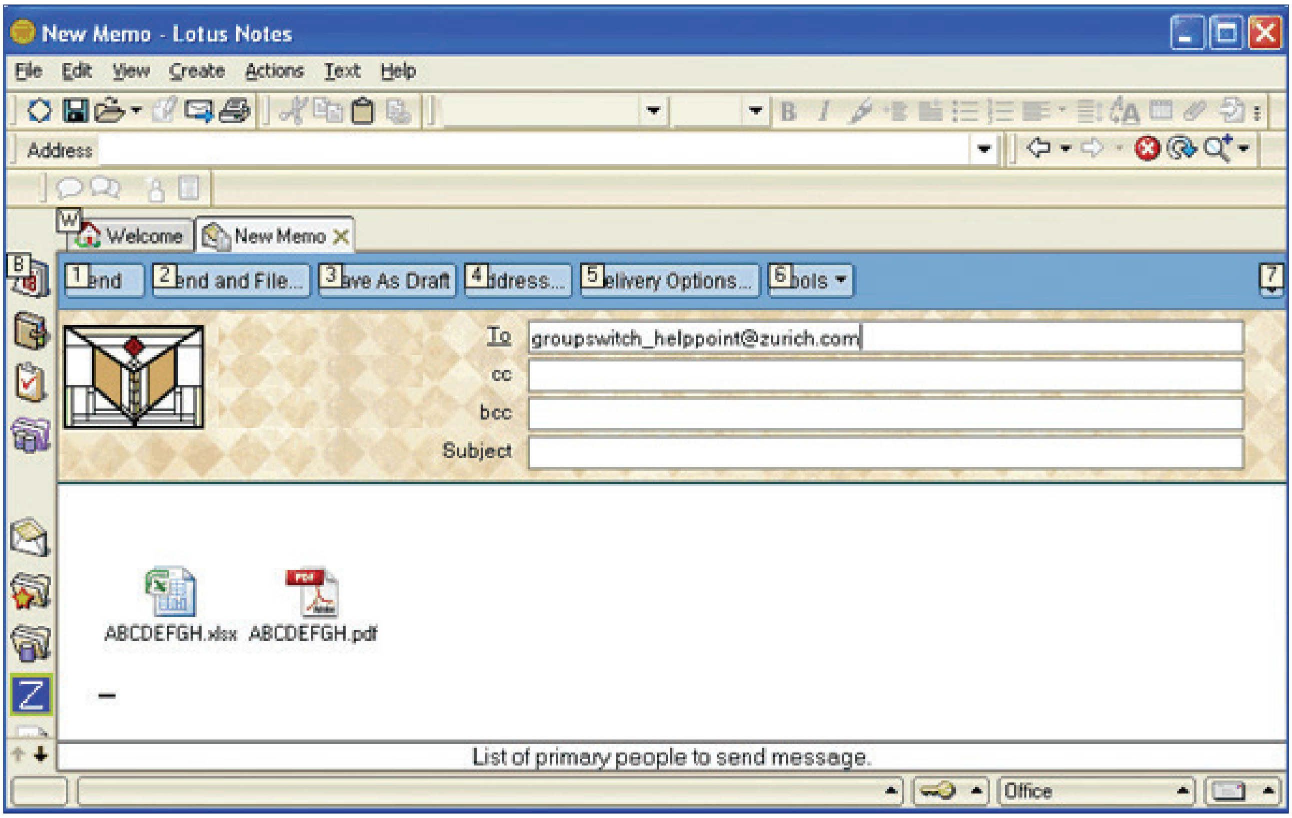
MR J ADVISER

Email address for the receipt of this instruction. Please do not leave the email address blank as we will use the email address that you provide to send the acknowledgement and switch acceptance report email notification.

thefiacompany@email.com

Please note that you do not have to have a scanned signature, you can sign in ink, and scan the whole document before emailing to us.

3. Attach the form and the spreadsheet to an email and send to us.



Other information

- No other instructions should be sent to this email address as it is not monitored and they will not be carried out.
- We will only accept a group switch instruction when both documents (with the same name) are sent as attachments in the email to ‘groupswitch_helppoint@zurich.com’.
- Each email must contain only one group switch instruction. If you have more than one instruction to send, you must send another email. Policies can only be included in one group switch instruction at a time. Depending on the settlement date of the underlying funds it can take up to 6 Isle of Man working days before a second switch can be processed.
- The cut-off time for all switches is 10am UK time. Switch instructions received after the cut-off time stated will be processed on the next available Isle of Man working day.
- Any partial or incorrect instructions will not be carried out and may result in processing delays, which could miss the switch cut-off times.
- Revised instructions received after the cut-off time of 10am UK time will not be backdated.
- If your policy group consists of various plan types, i.e. International Wealth Account, Vista etc., you only need to provide one type of fund code, we will automatically allocate the corresponding fund code for the different plan types in the group.
- In line with our current business acceptance policy, please note that no switches or redirections will be made where the policy owner(s) is/are resident in the United States including any United States federally controlled territory.

What happens next?

- Once a group switch instruction is received, an automated reply will be sent to the sending email address stating that the instruction has been received and that it will be processed subject to acceptability defined in the Fund investment adviser notification form and guidance notes.
- When a group switch has been processed, a group switch acknowledgement and switch acceptance email notification will be sent to the email address stated in section 4 of the group switch and redirection form. If no email address has been given, the acknowledgement and email notification will go to the sender.
- This report will detail each policy in the group and whether the switch has been accepted or rejected.
- Following this, a group switch acceptance report will be generated and sent to your Zurich International online (ZIO) user postbox.
- If a policy has been rejected, the report will detail the reason(s) why.
- Any rejected policies can be revised and resubmitted using a new group switch instruction.
- If we hold an email address for your clients, they will receive an email advising them that you have submitted a switch on their behalf and that they can view the results of the switch on ZIO. If we do not hold their email address, they will receive a switch confirmation letter.

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