Fidelity Personal Pension Switch Form

Fidelity INTERNATIONAL

Please complete in BLOCK CAPITALS using BLACK INK. **PLEASE NOTE: Any applications received that are not completed correctly may incur delays or may have to be returned to you.**

1 Personal Details

TITLE

SURNAME

FIRST NAME(S) IN FULL

ADDRESS ("Care of" and Junior ISA are not acceptable. Only UK addresses are eligible)
HOUSE NUMBER AND/OR HOUSE NAME

STREET, CITY, COUNTY AND COUNTRY DETAILS

POSTCODE

ACCOUNT NUMBER (This must be the account to which the below switch instructions will apply)

CONTACT TELEPHONE NUMBER (in case of query)

EMAIL

ARE YOU A UK NATIONAL ONLY? (PLEASE MARK AN X IN THE BOX) ☐

ARE YOU A UK NATIONAL AND NATIONAL OF ONE OR MORE OTHER COUNTRIES? (TICK BOX AND LIST ALL OTHER COUNTRIES BELOW) ☐

ARE YOU A NATIONAL OF NON-UK COUNTRIES ONLY? (TICK BOX AND LIST ALL OTHER COUNTRIES BELOW) ☐

NATIONALITY 1

NATIONALITY 2

NATIONALITY 3

NATIONALITY 4

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PLEASE TURN OVER

2 Switch Instructions

Please complete your fund choice(s) and redemption/investment amount(s) below. Please include the Fund Code which can be found at **fidelity.co.uk/funds**. Your fund choice will be derived by the Fund Code that you enter and not the Fund Name. Enter the amount/percentage that you wish to switch. Fund Manager's Buy or Sell Charges may apply. Where you are instructing us to switch an amount from a fund with a Fund Manager's Sell Charge, you authorise us to sell enough of this fund to generate the amount required after those charges. Please indicate the percentage that you wish to place in each fund, ensuring the total adds up to 100%. The following switch instructions will only be applied to the account number identified in Section 1.

We will reinvest income distributions unless you tell us to pay out income to the SIPP bank account. If you have a Monthly Savings Plan in place for this account collections will continue to be made unless you contact Fidelity to cancel the plan.

2.1 Switching Funds Instructions

FROM	FUND CODE	FUND NAME	AMOUNT (£)	OR	PERCENTAGE (%)
			.		.

TO	FUND CODE	FUND NAME	PERCENTAGE (%)
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			.
			.
			.
			.
			.
			100.00

FROM	FUND CODE	FUND NAME	AMOUNT (£)	OR	PERCENTAGE (%)
			.		.

TO	FUND CODE	FUND NAME	PERCENTAGE (%)
			.
			.
			.
			.
			.
			.
			100.00

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PLEASE TURN OVER

2.2 Buy from SIPP Cash

FUND CODE	FUND NAME	AMOUNT (£)
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		.
		.

2.3 Sell to SIPP Cash

FUND CODE	FUND NAME	AMOUNT (£)
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		.
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3 Important Documents

Before investing please make sure you read and save or print the up-to-date version of:

- The Key Features Document - Doing Business with Fidelity incorporating the Fidelity Client Terms.
- The Fidelity Personal Pension (Administered by Phoenix Life Limited, trading as Standard Life) Terms and Conditions document.
- The Fidelity Personal Pension (Administered by Phoenix Life Limited, trading as Standard Life) Terms addendum.
- Key information document applicable to your investment.
- The Generic Illustration (Standard Life) document.

Important Notice: If you have not received one or all of the documents listed above relating to the fund(s) you wish to invest in, please go to **www.fidelity.co.uk** or contact us on 0800 41 41 61 Monday to Saturday 9am to 6pm.

4 Declaration & Signature

I understand that the information I provide on this application form will be processed in accordance with Fidelity's data protection statement contained in the Fidelity Client Terms. I declare that:

- I have read the latest Key Features Document - Doing Business with Fidelity.
- I have read the latest key information document.
- I have read the latest illustration document.
- I accept the Fidelity Client Terms.
- I accept The Fidelity Personal Pension (Administered by Phoenix Life Limited, trading as Standard Life) Terms and Conditions.
- I accept The Fidelity Personal Pension (Administered by Phoenix Life Limited, trading as Standard Life) Terms addendum.
- The information given by me is correct to the best of my knowledge and I will inform Fidelity immediately of any changes to the information contained therein.

SIGNATURE OF APPLICANT AND DATE (YOU MUST SIGN HERE – Please ensure all relevant sections are completed as per the instructions on this form)

SIGNATURE ✗ ☐ ✗ ☐☐☐☐ 2 0 ☐☐

If you are signing the application form under Authority of a Power of Attorney or Court of Protection, please mark an X in this box. If you have not previously set up the Power of Attorney, you will need to do so. Please call Fidelity for the details of what documentation is required for this to be acceptable. ☐

Please send your completed form to Fidelity, PO Box 391,Tadworth KT20 9FU. Issued by Financial Administration Services Limited, (a Fidelity International company), which is authorised and regulated by the Financial Conduct Authority.

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