

2 Investment choices

2.1 Switch instructions

This form is for switching funds and cash only. Should you wish to change your exchange traded investments please use our online service at fidelity.co.uk/clients. To perform a switch please use the 'Switch from' section to let us know which of your funds you wish to sell and the percentage of each to be sold. For example, to switch entirely out of a fund please enter 100% for that fund. If you specify 40%, then we will sell 40% of your current holding. You must then use the 'Switch to' section to let us know how to invest the proceeds. For example to invest half of the proceeds into a specific fund, enter the fund details and 50%. You may specify some or all of the cash within your account to be included in the switch. Fund manager buy and sell charges may apply.

We will follow your investment instructions below by switching units, but where we cannot achieve this we leave any remaining proceeds in cash within your account and contact you.

Please ensure you include the fund code as your fund choice will be derived from the fund code and not the fund name. These can be found on each fund fact sheet at fidelity.co.uk/clients

Should any of your new funds pay income, we will follow your existing preferences for income payments on your account.

Switch from:

Fund code/Ref.	Investment name	Percentage of existing holding to be switched
<input type="text"/>	<input type="text"/>	<input type="text"/> %
<input type="text"/>	<input type="text"/>	<input type="text"/> %
<input type="text"/>	<input type="text"/>	<input type="text"/> %
<input type="text"/>	<input type="text"/>	<input type="text"/> %
<input type="text"/>	<input type="text"/>	<input type="text"/> %
Cash within my account		<input type="text"/> %

Switch to:

Fund code/Ref.	Investment name	Percentage of existing holding to be bought
<input type="text"/>	<input type="text"/>	<input type="text"/> %
<input type="text"/>	<input type="text"/>	<input type="text"/> %
<input type="text"/>	<input type="text"/>	<input type="text"/> %
<input type="text"/>	<input type="text"/>	<input type="text"/> %
<input type="text"/>	<input type="text"/>	<input type="text"/> %
Cash within my account		<input type="text"/> %
Totals should add up to 100%		<input type="text"/> 100 %

FAS_PensionSwitchInly/06.23/v7.0/

3 Declaration

I understand that the information I provide on this form will be processed in accordance with the Fidelity data protection statement contained in the Fidelity Adviser Solutions Client Terms.

I declare that:

- I have been provided with and read the key information documents.
- 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.

Your signature

By signing here I confirm I have read and completed all relevant sections as per the instructions on this form.

Date

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