



INTELLIGENTMONEY

AUTOMATIC ENROLMENT
PORTFOLIO SWITCH INSTRUCTION



Intelligent Money is authorised and regulated by the Financial Conduct Authority FCA number 219473 and is registered in England and Wales under Company Registration 04398291. The Registered Office address and address for all correspondence is,

The Shire Hall High Pavement Nottingham NG1 1HN.

Telephone Number 0115 948 4200. Fax Number 0115 979 9700. Email enquiries@intelligentmoney.com

AUTOMATIC ENROLMENT PORTFOLIO SWITCH INSTRUCTION

Important Information

This form is for use with the Intelligent Money Qualifying Workplace Pension only. Please use this form to elect to switch to, or between, IM Default Portfolios or the IM Optimum portfolios

Member Details

Member Name	<input type="text"/>
Member Reference	<input type="text"/>
Nominated Retirement Date	<input type="text"/>

New Portfolio Choice for Future Regular Contributions

Name of the portfolio(s)	% to invest
<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>

New Portfolio Choice for Existing Investments

Name of the portfolio(s) you wish to switch from	% to switch	Name of the portfolio(s) you wish to switch to	% of proceeds to invest (must total 100%)
<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"/>

If this switch has taken place under the advice of a regulated financial adviser and an adviser fee is due to be paid please also complete Intelligent Money's 'Facilitation of Adviser Charging Form'.

Investment Switch Authority

This section must be signed by the person requesting the changes to the investment choice. You must indicate in which capacity you are acting.

1. I request the new investment choice and any transactions arising therein, as specified in this form.
2. I confirm that I have the authority to request these transactions and if requested can provide proof of such authority.
3. In cases where this transaction is instructed by a Financial Adviser. The financial adviser;
 - a. Declares that an Investment Management Authority or similar document ('The Authority') is currently in force authorising the signatory below to make investment decisions on behalf of the plan holder. Intelligent Money may at any time request sight of The Authority and the financial adviser agrees to fulfil any such request within 48 hours of receiving it.
 - b. Will indemnify Intelligent Money for any losses arising from processing this form if the request is made without sufficient lawful and/or member authority.

Print Full Name	<input type="text"/>
Capacity	<input type="text"/>
Signed	<input type="text"/>
Date	<input type="text"/>