

Baby Bond® Choice Instruction to switch funds and/or redirect future contributions

Please complete this form in BLOCK CAPITALS using a ballpoint pen and return to FREEPOST (RLRZ-ZAZZ-GACY), PO Box 2067, Gloucester GL4 3YU.

Step 1 – Child Trust Fund Details

First Name Surname

Date of Birth

D	D	M	M	Y	Y	Y	Y
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 Child Trust Fund URN

<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
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Step 2 – What would you like to do – please cross one box only

- I would like to switch existing investments only (complete Step 3 and Step 4)
- I would like to redirect future contributions only (complete Step 4)
- I would like to both switch existing investments and redirect future contributions (complete Step 3 and Step 4)

Step 3 – Existing Investment Choices

Please provide the name(s) of the fund(s) you would like to switch out of and either the number of shares, or the value, you would like to switch.

Name of fund	Number of shares or value	
	Number of shares (or All)	Value (or All)
		£
		£
		£
		£
		£
		£


Step 4 – New Investment Choice

Please show here the fund(s) you would like to switch into, or redirect your future contributions into. The total must add up to 100%.

Name of fund	New allocation (%)
GARTMORE Cautious Managed Fund	
GARTMORE European Selected Opportunities Fund	
GARTMORE US Growth Fund	
SWIP Foundation Growth Fund	
HENDERSON GLOBAL INVESTORS Global Care Growth Fund	
INSIGHT INVESTMENT UK Government All Maturities Bond Fund	
INVESCO PERPETUAL Income Fund	
INVESCO PERPETUAL Managed Growth Fund	
INVESCO PERPETUAL UK Smaller Companies Equity Fund	
UBS Global Allocation Fund (UK)	
UBS UK Select Fund	
TOTAL	100%

Step 5 – Declaration

I confirm I am the Registered Contact for the above CTF account and I would like to effect the change(s) detailed above, in accordance with the Terms and Conditions (see over).

APPLICANT'S SIGNATURE 

Date

D	D	M	M	2	0	Y	Y
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Extract from Terms and Conditions of The Children's Mutual Baby Bond® Choice CTF Account

Condition 9 – Switching funds (Baby Bond® Choice only)

- 9.1 At any time the Registered Contact may ask us to switch money from any OEIC fund or funds to any other OEIC fund or funds that we offer for investment through Baby Bond® Choice.
- 9.2 The Registered Contact must tell us:
- (a) which OEIC fund(s) they wish to switch out of, and
 - (b) either the number of shares, or the value in money, that they wish to switch, and
 - (c) which OEIC fund(s) they wish to switch into, and
 - (d) if the switch is into more than one OEIC fund, the proportion of shares or the value in money switched that is to be invested in each OEIC fund after the switch.
- 9.3 We will cash-in however many OEIC fund shares are required to effect the requested switch on the next valuation point after we receive the Registered Contact's instructions. We will then use the cash-in value to buy shares in the new OEIC fund(s) on the valuation point two working days later.
- 9.4 We do not make a charge for switches, but the amount switched into any OEIC fund will be treated as a new investment and our standard charges for Non-Stakeholder accounts will apply.
- 9.5 After the switch, we will continue to invest new payments into the account into OEIC fund shares in the proportions that applied before the switch, unless the Registered Contact instructs us to invest new payments in different proportions.