Fund Switch Requests

Who will we accept switch requests from?

Plan Type	Request will be accepted from:
Personal Pension	Policy Owner only
Company Pension	Trustee/Director Member (only in cases where an independent trustee is in place)
Personal Retirement Bond	Policy Owner Only
ARF/AMRF	Policy Owner Only
Investment Only	2 signatures from 2 Trustees/Directors
Investment Bond	Policy Owner Only

Deadlines

Daily cut off time for switches is currently **9 am to 5.30 pm**

Switch requests received before 5.30 pm on a given day, will be processed with effect from that date. This assumes that all information required to fully process the switch has been provided.

Will we accept fund switch requests by email?

Yes, at the moment we will accept all valid fund requests by email. But please note that this may change in the future.