Foresters Financial

Fund Switch form and monthly contribution redirection

Simply complete the form below in BLOCK CAPITALS and black ink. It is very important to read the information, answer all questions and sign the 'Declaration and Authority' section. Please print this form, then complete and return to FREEPOST Foresters Financial, Forester Life, 2 Cromwell Avenue, Bromley BR2 9BF. No stamp required.

1. Plan Information and Planholder's Details

Plan Number

Title Mr / Mrs / Miss / Ms / Other

Forename(s)

Surname

Tel. No. (in the event of queries)

National Insurance (NI) No.

Address (permanent residence)

Postcode

Email address

Date of Birth D D M M Y Y Y Y

2. Registered Contact's Details (for Child Trust Funds and Junior ISAs where the Planholder is different to the Registered Contact)

Title Mr / Mrs / Miss / Ms / Other

Forename(s)

Surname

Tel. No. (in the event of queries)

Gender Male Female

Address (permanent residence)

Postcode

Email address

Date of Birth D D M M Y Y Y Y

3. Fund switch: current value

This section is to be completed if you would like to change the fund(s) for the current value of the Plan. Details of where your fund is invested can be found on MyPlans where a fund switch can also be made online, or Customer Services and your Forester Life Financial Adviser can provide you with this information.

It is important to read the Key Information Document (if applicable) or any other documentation about the fund before you make your choice. These can be found on **foresters.com**

Current funds Please list the fund(s) name and percentage of the existing funds that you wish to switch from	
Fund name	%

New funds Please list the fund(s) and percentage that you wish to switch to	
Fund name	%

Please turn over >

4. Fund switch: future contributions

This section is to be completed if you would like to change the fund(s) for any current and future monthly contributions to the Plan. Details of where your fund is invested can be found on MyPlans where a fund switch can also be made online, or Customer Services and your Forester Life Financial Adviser can provide you with this information. It is important to read the Key Information Document (if applicable) or any other documentation about the fund before you make your choice. These can be found on **foresters.com**

Current funds (only to be completed if there are existing Direct Debits) Please choose the fund(s) and percentage of your existing monthly that you wish to switch from	
Fund name	%

New funds Please choose the fund(s) and percentage that you wish to switch to	
Fund name	%

5. Using your Personal Information

We are committed to ensuring your privacy and personal information is protected. This notice explains the information we may hold, how we obtain it and for what purposes, who we share it with and why, and the rights you have in respect to your information. This is further explained in more detail in our Privacy Policy.

We are Forester Life Limited (Forester Life), a company registered in England under company number 2997655. Our registered office is at Foresters House, 2 Cromwell Avenue, Bromley, BR2 9BF. We are a registered Data Controller and our Data Protection Officer can be contacted by email at data.protection@foresters.co.uk or at the above address.

Personal information is information that identifies you, is about you and is provided through your dealings with us. It includes your name, address, contact details, date of birth and Forester Life Plan details. In addition we hold information that we use to manage our relationship with you (contact, complaints and financial information) and information about how you interact with our website. In certain circumstances we may request and receive sensitive personal information about you.

The information you provide to Forester Life will be used for setting up and administering Forester Life Plans, for communicating with and keeping customers informed and for maintaining a record of complaints. In addition it will also be used for research and analysis, for marketing of our products and services and for compliance monitoring and crime prevention.

We share your information with our service providers, identity verification services such as credit reference agencies, and other parts of the Foresters organisation. We will not disclose any of your information to any other body or organisation except to prevent crime or if required by regulations or any law enforcement organisation.

We will retain your information for as long as you are a Forester Life Planholder, and in accordance with our data retention guidelines and legal and regulatory obligations.

Your rights in relation to your information are set out in our Privacy Policy. This is available on our website **foresters.com** or by request from Customer Services on 0333 600 0333.

The policy provides more detailed information on how to view, correct, withdraw or otherwise change the way we use your personal information.

If we have been unable to satisfy your concerns regarding any aspect of the processing or handling of your information you can contact the Information Commissioners Office on telephone helpline: 0303 123 1113, email visit www.ico.org.uk/global/contact-us/email/ or by post at Information Commissioners Office, Wycliffe House, Water Lane, Wilmslow, Cheshire SK9 5AF.

By submitting the declaration you will be confirming that you have read this notice about using your personal information.

Electronic marketing preference

From time to time Foresters Financial will send information about relevant products and services via electronic methods such as email. We will not disclose your details to anyone outside of Foresters Financial for marketing purposes and you may change your marketing preference at any time.

If you prefer NOT to receive marketing via electronic methods please tick the box ☐

6. Declaration and Authority

I confirm that:

- I have read the notice regarding use of my personal information;
- I have not received any financial advice from a Forester Life Financial Adviser in respect to this fund switch
- the information provided by me in making this application is correct and to the best of my knowledge and belief.
- I am comfortable with the risks.

Signature of applicant _____ Date _____