

Financial Adviser Managed Funds Switch Form

Date of Submission		Use this form when you want to request a switch of some or all funds under the same investment number. The new allocation must add to 100%. Fund switch requests will take up to 5 business days to process. Any transactions underway prior to the completion of these changes will be applied using the previous fund allocation.	
Financial Adviser		Adviser Assistant (if relevant)	
Full name			
Company			
Investor Details			
Investor First name			
Investor Surname			
Investment Number	NIK		
Please detail below the CURRENT funds in this investment			
Please detail below the NEW funds		Rebalance existing fund allocation	Future contributions allocation
		%	%
		%	%
		%	%
		%	%
		%	%
		%	%
Total must add to:		100%	100%
Additional Notes			