amova Asset Management

Financial Adviser Managed Funds Switch Form

Date of Submission

Use this form if you are the authorised Financial Adviser for the investment listed below to request a partial or full fund switch under the same investment number. The new allocation must add up to 100%. Fund switch requests may take up to 5 business days to process. While a switch is in progress, no other changes can be requested on the investment. Any transactions already underway before the switch is completed will be processed using the previous fund allocation.

Financial Adviser	Adviser Assistant (if relevant)
Full name:	**Full name:**
Company:	

1. Current investment details

Investor full name:

Investment Number: NIK

Please detail below the CURRENT funds in this investment

None Selected

None Selected

None Selected

None Selected

None Selected

2. What would you like to do?

☐ Single fund-to-fund switch
Proceed to Section 3. Below.

☐ Rebalance current portfolio (investment)
Proceed to Section 4. Below.

3. Single fund-to-fund switch

Current fund	New fund
None Selected	None Selected

Allocation

☐ Same as current.

☐ Change fund allocation? Go to Section 4 as a change to fund allocation will require a portfolio rebalance.

Future Contributions

☐ Apply future contributions that were going to the current (old) fund into the new fund.

☐ I want to make other adjustments to future contributions. Go to Section 4 as a change to future contribution allocations will require a portfolio rebalance.

4. Rebalance Current Portfolio

If more than one fund is changing for this investment (for allocation or contributions), then the portfolio must be rebalanced. Please complete the details for the new portfolio below.

List the (all) funds for this investment	Fund allocation	Future contributions allocation
None Selected		
None Selected		
None Selected		
None Selected		
None Selected		
Total must add to:	**100%**	**100%**

Additional Notes / Instructions: