

# Investment Decision Form

**Note:**  
Please complete in  
BLOCKCAPITALS.

## A Pension Member Details

Member Name	<input type="text"/>	Date of Birth:	<input type="text"/>
Pension Plan Number(s):	<input type="text"/>		
Group Name:	<input type="text"/>		

Before providing your personal information, you should make yourself familiar with your data protection rights and how we use your personal data. For further information with respect to your rights, please see our Privacy Policy which is available at [www.zurich.ie/privacy-policy](http://www.zurich.ie/privacy-policy).

## B Investment Decision

Please confirm which of the following that you would like your fund switch request to apply to:

Your existing funds only	Yes	No
Your future contributions only	Yes	No
Both your existing and future contributions	Yes	No

## C Your Investment Choice

Fund Name	Percentage
Prisma <b>2</b>	%
Prisma <b>3</b>	%
Prisma <b>4</b>	%
Prisma <b>5</b>	%
Prisma <b>Max</b>	%
Cash	%
Active Fixed Income	%
International Equity	%

**Other Funds** - please see the 'Fund Guide' on [zurich.ie](http://zurich.ie) for a full list of available funds.

<input type="text"/>	%
<input type="text"/>	%
<input type="text"/>	%
<input type="text"/>	%

**Total (must equal 100%)** **100%**

### \*Other Funds Investment Choice:

The eight funds listed above have been selected by the Trustees as appropriate investment choices for members who wish to invest outside the default investment strategy of the scheme. If you wish to invest outside of these eight funds the details of the other fund options can be found on our website – [www.zurich.ie/funds](http://www.zurich.ie/funds)

Before choosing to invest in any of these funds the Trustees of your scheme recommend that you read the information provided on the fund section of the Zurich website and ensure you are satisfied that you understand the risk and return objective of these funds.

Member Signature:	<input type="text"/>	Date	<input type="text"/>
	<b>X</b>		



**Member Authorisation:**  
Please sign and date.

## Notes

### Effective Date

The fund switch will be processed effective from the date that we receive this investment decision form. Please ensure that the form is completed fully before returning it to Zurich Life Assurance. If any areas of the form are not completed, it may lead to an invalid fund switch instruction which will mean that we cannot proceed with processing the fund switch.

### Investment and Unit Price Dates

For Zurich managed funds what happens in the marketplace today is reflected in tomorrow's published unit price (This is usually published by 5pm). Example: Policy invested in a Zurich managed fund at 3pm on a Wednesday, the unit prices have not been published for the day and the policy value online represents close of markets on Monday. At 8pm on a Wednesday, the unit prices should have been published for the day and the policy value online represents close of markets on Tuesday. Please note, this can be different in some externally managed funds and funds with significant Asian holdings. Our unit prices are published daily on the website: [www.zurich.ie/broker-centre/fund-range/fund-price-calculator/](http://www.zurich.ie/broker-centre/fund-range/fund-price-calculator/)

Further information on this is found on the Fund Performance and Fund Price calculator pages under 'important information about dates'.

### Personalised GuidePath (PGP) Strategy

You are currently invested in the Personalised GuidePath (PGP) strategy, should you wish to alter your PGP investment strategy this can be done online through your client dashboard using your own unique log-in details. The client dashboard can be accessed at [www.zurich.ie](http://www.zurich.ie).

The client dashboard allows you to personalise your growth phase, retirement planning phase or strategy end date.

Proposed changes to your PGP investment strategy must be submitted online, changes will not be accepted via this investment decision form.

### Charges

The first four Unit Fund switches on this policy in any one policy year will be free of charge. A Unit Fund switch charge will only be deducted from the Unit Account for the fifth and subsequent Unit Fund switches requested since the last policy anniversary date. The Unit Fund switch charge is currently €20. This charge is guaranteed to increase by no more than the increase in the Consumer Price Index since the amount of the charge was last set.

**For more information on Zurich's responsible investment strategy, please refer to Zurich's website: <https://www.zurich.ie/funds/responsible-investment/>**

## Zurich Life Assurance plc

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Zurich Life Assurance plc is regulated by the Central Bank of Ireland.