

# Investment Switching Application Form

(For Homemaker, Trustworthy Mortgage Plan, DBS Mortgage Plan, Top Tracker Mortgage and SFIA Education Plan.) Please complete in block capitals and return to Synergy Financial Products Limited, PO Box 1010, St Albans, AL1 9NB.

## 1. PERSONAL DETAILS

Plan Number

Surname

Title

First Names

Current Address

Post Code

Telephone Number Day/Work  Evening/Home

Date of birth   -   -

National Insurance Number   -   -   -   -

## 2. INSTRUCTION

Please tick as appropriate.

Switching Existing Investments  Yes  No (if yes, please complete section 2A)

Redirect Future Subscriptions  Yes  No (if yes, please complete section 2B)

## 2A: SWITCH EXISTING INVESTMENTS

Please indicate your new investment choice. The total must equal 100%.

Fund Name		Fund Name	
Janus Henderson Institutional UK Index Opportunities Trust A Acc	%	The City of London Investment Trust Plc	%
State Street European Fund	%	Foreign & Colonial Investment Trust Plc	%
State Street North American Fund	%	Murray Income Trust Plc	%
State Street Japan Fund	%	Scottish Mortgage Investment Trust Plc	%

Your entire existing investment will be switched to the investment chosen above.

## 2B: REDIRECTION OF FUTURE SUBSCRIPTIONS

If you wish to redirect your future subscriptions please complete the below information. **If you don't complete the below information your future investments will be made in accordance with your last instruction.** The total must equal 100%:

Janus Henderson Institutional UK Index Opportunities Trust A Acc	%	The City of London Investment Trust Plc	%
State Street European Fund	%	Foreign & Colonial Investment Trust Plc	%
State Street North American Fund	%	Murray Income Trust Plc	%
State Street Japan Fund	%	Scottish Mortgage Investment Trust Plc	%

## 3. AUTHORISATION

Please sign and date the form below:

Signature

Date

Please send your completed Application form to:

**Synergy Financial Products Limited**  
**PO Box 1010**  
**St Albans**  
**AL1 9NB**

Synergy Financial Products Limited is registered and incorporated in England and Wales, number 1397169.  
Authorised and Regulated by the Financial Conduct Authority number 312416 and can be seen at [www.fca.org.uk](http://www.fca.org.uk)  
Registered office: SFPL, Centrium 1, Griffiths Way, St Albans, AL1 2RD  
[support@sfpl.co.uk](mailto:support@sfpl.co.uk) - 0330 1239938