

WS Prudential Investment Funds (1)

Switching Instruction Form

About this form

Please complete all relevant sections in blue or black ink, write in CAPITAL LETTERS or tick as appropriate and sign this form on the reverse.

Before you sign this form: you should read, understand or have satisfactorily explained to you the latest version of the Key Investor Information Document (KIID), as applicable, for your chosen share/unit class in each fund in which you want to invest, and the Additional Investor Information Document you received with this form, which includes the Waystone Management (UK) Limited Customer Agreement. Copies of the Prospectus, and most recent Annual or Interim Fund Reports are also available to you if desired.

If you have any questions or would like a free up-to-date copy of the KIID, Additional Investor Information Document, Prospectus or most recent additional application forms, please call us on **0344 335 8936** between 8:30am and 5:30pm Monday to Friday. All literature will be provided in English. These documents are also available at https://www.waystone.com.

Commission may be payable, depending on the Share class chosen and whether advice has been given.

If you wish to switch all or part of your investment into an ISA, please complete the Switching from an OEIC into an ISA Form.

Please return the completed form to Waystone Management (UK) Limited, PO Box 389, Darlington DL1 9UF.

We may have to return any instruction that is incorrectly completed.

Part 1 - Adviser details (only to be completed by a financial adviser)

	t sales data purposes if you did not provide advice on this switch	
please tick		
Company name	Agent code	
Adviser name		
FRN	IRN	

If advice has been provided on the investment(s) detailed in Part 3, please ensure you select the "R" Share class otherwise adviser charge will not be paid.

Pa	rt 2 – Inve	estor(s)	details				
Fir	st holder						
	cond holder applicable)	r					
Cu	stomer num	ber					
De	signated ac	count nar	me (if applicable)				
Ad	dress						
					Postco	ode	
Da	ytime teleph	none num	ber				
Pa	ırt 3 – Swi	tching o	letails				
•			nd range and inves			n be found in the	Prospectus,
•	You can switch all or part of your investment between funds. If you are only switching part of your investment you must leave at least $£500$ in the fund you are switching from.						
	Your first switch must be at least £500 in each fund. Switches after this must be at least £250.						£250.
•	There is no charge made for switching between funds.						
•	Please indicate the choice of fund(s) you wish to sell and the fund(s) you wish to purchase with the sale proceeds.						
•	Please specify the share class you wish to invest in, failure to do so may result in your application being rejected.						
INC	COME/ACC	UMULATI	ON OPTION				
lf y	ou have sele	ected to s	witch from an Acc	umulation Option	to an Income Op	tion so that inco	me can be paid

If you have selected to switch from an Accumulation Option to an Income Option so that income can be paid direct to your bank or building society account, please delete 'Accumulation' in the 'Income/Accumulation Option' column in Table 2 overleaf for the appropriate fund(s) that you are switching into and complete Part 4.

For funds offering both Accumulation and Income Options, if none/both options are ticked then the Accumulation Option will be allocated for that fund.

Please note that the Income Option is not available to regular savers.

DIRECT DEBIT OPTIONS	
If you would like to continue making your direct debit payments to the funds you are switching into please tick the box.	
If you would like to continue making your direct debit payments to the funds you are switching out of please tick the box.	
If you do not wish to continue making payments by Direct Debit into any fund, please tick the box. $ \\$	

We recommend that you notify your bank or building society that the Direct Debit has been cancelled.

If you are not currently subscribing by Direct Debit, and you would like to start one for the fund(s) you are switching into, please contact us on $0344\ 335\ 8936$ to obtain further information.

Please note that switching forms can be used for switching between funds. Any switching between share classes within the same fund will be transacted as a conversion.



PART 3A - SWITCHING OUT INSTRUCTION Table 1

Full name of fund(s) to be switched out of	Share class (e.g. A†, R*)	Income/ Accumulation option (delete as appropriate)	Number of shares or value of fund(s) to be switched (please specify FULL if total holding to be switched)	
WS Prudential Risk Managed Active 1		Inc/Acc	or	£
WS Prudential Risk Managed Active 2		Inc/Acc	or	£
WS Prudential Risk Managed Active 3		Inc/Acc	or	£
WS Prudential Risk Managed Active 4		Inc/Acc	or	£
WS Prudential Risk Managed Active 5		Inc/Acc	or	£
WS Prudential Risk Managed Passive Fund 1		Inc/Acc	or	£
WS Prudential Risk Managed Passive Fund 2		Inc/Acc	or	£
WS Prudential Risk Managed Passive Fund 3		Inc/Acc	or	£
WS Prudential Risk Managed Passive Fund 4		Inc/Acc	or	£
WS Prudential Risk Managed Passive Fund 5		Inc/Acc	or	£

^{*} The "R" Share class is only for customers who received advice when they originally took out their investment.

PART 3B - SWITCHING IN INSTRUCTION Table 2

Full name of fund(s) to be switched into	Share class (e.g. A†, R*)	Income/ Accumulation option (delete as appropriate)	Please indicate a percentage split if the sale proceeds are to be divided between funds (must total 100%)
WS Prudential Risk Managed Active 1		Inc/Acc	%
WS Prudential Risk Managed Active 2		Inc/Acc	%
WS Prudential Risk Managed Active 3		Inc/Acc	%
WS Prudential Risk Managed Active 4		Inc/Acc	%
WS Prudential Risk Managed Active 5		Inc/Acc	%
WS Prudential Risk Managed Passive Fund 1		Inc/Acc	%
WS Prudential Risk Managed Passive Fund 2		Inc/Acc	%
WS Prudential Risk Managed Passive Fund 3		Inc/Acc	%
WS Prudential Risk Managed Passive Fund 4		Inc/Acc	%
WS Prudential Risk Managed Passive Fund 5		Inc/Acc	%

^{*} The "R" Share class is only for customers who received advice when they originally took out their investment.



[†] Please note that Accumulation Shares only are available.

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Part 4 - Income payment details					
Do you wish to:(i) Reinvest Income automatically					
(ii) Pay Income out to my nominated bank account (see below)					
Please complete this section if you have selected to pay income out so that it can be paid direct to your bank or building society account. Please take care when completing this section as Waystone Management (UK) Limited cannot take responsibility for incorrectly completed bank or building society account details. The bank or building society account must be in the holder's name.					
NAME AND FULL POSTAL ADDRESS OF BANK/BUILDING SOCIETY					
Name					
Address					
Postcode					
Bank/buliding society account number					
Branch sort code*					
Building society collection account number*					
Name(s) of account holder(s)					
* The building society sort code and collection number can be obtained from your building society.					
Part 5 – Switch to regular withdrawals If you wish to amend your regular withdrawals, please complete the relevant section of the Withdrawals Form.					
Part 6 - Declaration and authorisation am/We are aware that the Prospectus and the latest Annual and, if more recent, Interim Fund Reports are available free of charge and I/We confirm that I/we have accessed them to the extent I/We believe necessary. We have, read and understood or had satisfactorily explained to me received the latest versions of the KIID and Additional Investor Information Document.					
I/We hereby authorise the switch between funds within my WS Prudential Investment Funds (1) fund.					
Signature Date Date	Y				
Signature Date	Y				

Waystone Management (UK) Limited (WMUK) is authorised and regulated by the Financial Conduct Authority. Registered Office 3rd floor, Central Square, 29 Wellington Street, Leeds LS1 4DL. WMUK is a wholly owned subsidiary of Waystone Centralised Services (IE) Limited and is registered in England and Wales with registered no. 03692681. Telephone 0203 997 2460. Calls may be monitored and/or recorded to protect both you and us and help us with our training. Registered in England and Wales with registered no. 03692681

