

INVESTMENT BOND

Application/Extra Investment form

This form can be used for new customers applying for an AXA Investment Bond as well as existing customers to add extra investments to their existing AXA Investment Bond.

 Information in this form is confidential when completed

Important notes


We're pleased you have decided to apply for a new Investment Bond or add an extra investment to your existing Bond.

This form has been designed to be easy to fill in. To help you, please note the following points:

- Our literature explains the benefits and risks of the Bond.
 - The minimum payment into a new Bond is £5,000.
 - The minimum extra investment into an existing Bond is £2,000.
 - The maximum age of the (youngest) life insured cannot be over 84 years.
 - Please fill in this application form using **black ink** and **CAPITAL LETTERS**.
 - If you make a mistake please:
 - cross it out;
 - put in the correct word(s); and
 - sign your initials next to the correction.
- Please do not use correction fluid (such as Tipp-Ex).
- Please help us by completing the relevant sections of the form as fully and accurately as you can. If you do not complete all of the relevant sections, the start date of your Bond/Extra investment will be delayed until we receive all information.
 - If you need more space to answer any questions, please use the space provided in Section G.
 - Please return your completed application form to:
AXA Administration Centre (Investments), PO Box 1810, Bristol, BS99 5SN.
 - If you would like any further information or have any queries, please speak to your financial adviser.

A About the Bond

Part 1 New Customers

 Please see our literature for more details on the pricing options available. Your financial adviser will be pleased to discuss this further with you. So that AXA can set up your Bond on the correct terms please enclose a copy of the illustration. Failure to send an illustration will result in your Bond being set up on standard terms. Sections A, B, C, D and H must be completed in full.

Please select the pricing option for your Bond:

Tiered Allocation Step Down Yearly Charge Easy Access


 Please note that if a pricing option is not selected, your Bond will be set up using Tiered Allocation.

Is the Bond to be written in trust?

yes no

If yes, please include the trust document.

Part 2 Existing Customers

 You can normally add extra investments into your Bond at any time. Please see our literature for the terms on which extra investments can be made or speak to your financial adviser. If you are invested in the With Profits Fund, you cannot put your extra investments into the With Profits Income Fund and vice versa. Sections A, B, D and H must be completed in full.

Plan Number



Be Life Confident

C About the life (lives) insured

You can name up to nine lives insured, but the youngest life insured must not be older than 84 years. If the life (lives) insured are the same as the planholder(s) please go straight to Section D.

	Life insured 1	Life insured 2
1 Title (Such as Mr, Mrs, Dr)	<input type="text"/>	<input type="text"/>
2a Last name	<input type="text"/>	<input type="text"/>
2b First names	<input type="text"/>	<input type="text"/>
3 Sex	male <input type="checkbox"/> female <input type="checkbox"/>	male <input type="checkbox"/> female <input type="checkbox"/>
4 Date of birth (dd/mm/yyyy)	<input type="text"/>	<input type="text"/>

For more than two lives insured, please give details of the further life (lives) in Section G 'Further information'.

D About the Bond

How much do you want to invest?

£

Minimum payment into a new Bond is £5,000.
Minimum extra investment is £2,000.
Please make your cheque payable to 'AXA Sun Life'.

We will set up the Bond with 100 policies. For extra investments we will divide the amount equally between the policies you hold.

Please indicate below which fund(s) you want to invest in, writing the percentage you wish to invest in the column beside the fund name. For AXA core and AXA global family funds, please use Parts 1 and 2 respectively. For AXA external partners' funds, please write the name(s) of your fund(s) clearly, along with the percentage to be invested in each, in Part 3. You can invest in up to 30 funds at any one time. For more details of our funds, please see our literature or visit www.axa.co.uk/investments

Part 1 AXA core funds

Fund name	
AXA Active Protector 70 Fund	%
AXA Active Protector 70 Plus Fund	%
AXA Active Protector 80 Fund	%
AXA Active Protector 80 Plus Fund	%
AXA Cash Fund	%
AXA Cautious Managed Fund (previously Extra Income Fund)	%
AXA Deferred Distribution Fund	%
AXA Distribution Fund	%
AXA Ethical Fund	%
AXA Europe Fund	%
AXA Fixed Interest Fund	%
AXA Global Distribution Fund	%
AXA Global Equity Fund	%
AXA Global Managed Fund	%
AXA High Yield Distribution Fund	%

Fund name	
AXA Higher Income Fund	%
AXA Index-Linked Fund	%
AXA Japan Fund	%
AXA Managed Fund	%
AXA Monthly Distribution Fund	%
AXA Monthly High Yield Distribution Fund	%
AXA Monthly UK Corporate Bond Fund	%
AXA North America Fund	%
AXA Pacific Fund	%
AXA Property Fund†	%
AXA Reserve Fund	%
AXA UK Corporate Bond Fund	%
AXA UK Equity Fund	%
AXA UK Opportunities Fund	%
AXA UK Tracker Fund	%

† Please note that any new or additional investment in the Property Fund will be limited to 50% of the new investment.

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D About the Bond continued

Part 2 AXA global family funds

Fund name		
AXA ACM UK Value Fund		%
AXA Framlington American Growth Fund		%
AXA Framlington Biotech Fund		%
AXA Framlington Financial Fund		%
AXA Framlington Global Technology Fund		%
AXA Framlington Health Fund		%
AXA Framlington Managed Balanced Fund		%
AXA Framlington Managed Income Fund		%
AXA Framlington Monthly Income Fund		%
AXA Framlington Pan European Bond Fund		%
AXA Framlington UK Growth Fund		%
AXA Framlington UK Select Opportunities Fund		%
AXA Framlington UK Smaller Companies Fund		%
AXA Global High Income Fund		%

Fund name		
AXA Multimanager Balanced Fund		%
AXA Multimanager Cautious Income Fund (previously Choice Higher Income Fund)		%
AXA Multimanager Dynamic Fund (previously Choice Active Portfolio Fund)		%
AXA Multimanager Growth Fund (previously Choice Growth Fund)		%
AXA Multimanager Income Fund (previously Choice Income Fund)		%
AXA UK Long Corporate Bond Fund		%
AXA UK Long Gilt Fund		%
AXA UK Strategic Bond Fund		%
AXA World Funds Emerging Europe Equities Fund		%
AXA World Funds European Small Cap Equities Fund		%
AXA World Funds Optimal Income Fund		%
AXA World Funds Talents Fund		%
AXA World Funds Talents Absolute Fund		%

Part 3 AXA external partners' funds

 Please use Section G if you require more space.

Fund name		
		%
		%
		%
		%
		%
		%
		%
		%
		%
		%

Fund name		
		%
		%
		%
		%
		%
		%
		%
		%
Total		100%

E Regular withdrawals

Do you want to start taking/amend your current regular withdrawals from your bond?

yes no

(Please note that if you are currently taking withdrawals as a percentage of investment, future withdrawal payment will be based on a percentage of all your payments into the bond. If you want payments to remain at a fixed amount please complete the monetary payment you require below.)

If YES, complete your new withdrawal requirements below, if NO, please go onto Section H.

If you pay higher rate income tax, or are close to having to pay it, and you want to withdraw more than 5% a year of the initial investment, please ask your financial adviser for advice about your tax situation.

- Up to a maximum of 7.5% of the value of the Bond can be taken each year as a regular withdrawal.
- This 7.5% includes any regular withdrawals and any distributions or payments from the Distribution, High Yield Distribution, UK Corporate Bond funds or their monthly alternatives.
- If you do not use the 7.5% allowance it cannot be rolled over to subsequent years.
- Any withdrawal over 7.5% cannot be paid regularly and must be requested separately as a partial cash-in; Early Cash-in Charges may apply.
- Early Cash-in Charges on Tiered Allocation and Step Down Yearly Charge options apply for the first five years only.
- We will normally pay withdrawals on the same day of the month that the Bond begins.

The amount or percentage of the withdrawal should be the total withdrawal you want from your total investment, not just the withdrawal from your extra investment.

I Adviser information

To be completed by the financial adviser (where applicable)

- 👉 Please include a copy of the AXA illustration and the illustration reference when you send in this application form. If you do not provide these details AXA will set up the Bond on your standard terms. Please include the illustration reference number in the box below.

Illustration reference number

Use of unauthorised intermediaries

Please tick the box to confirm that the following statement is true

I confirm that this business was not transacted as a result of the direct or indirect involvement of another person who is not an authorised or exempt person as defined in Financial Services and Markets Act 2000.

Explanation

This confirmation is required to meet the requirements of PRU 9.4.7 and PRU 9.4.8 and AXA cannot accept this business without this confirmation.

FSA reporting: Product Sales Data

Please note that it is a breach of the Financial Services Authority (FSA) requirements if you fail to answer the following question:

Did you give advice in relation to this application? (please tick)

yes no

Anti-Money-Laundering

- 👉 In addition to this application form and the illustration, please complete and send in a customer identification/verification certificate to enable us to issue the plan.

1 Name and Business address of the registered individual involved in the sale of this plan

postcode

2 Business name and address of the financial adviser's firm

postcode

3 Contact name if different from 1

4 Telephone number

5 Email address

6 FSA number

7 Was the contract completed on an execution-only basis?

yes no (If yes, please submit an execution-only declaration signed by all planholders)

- 👉 If any information is missing it may prevent AXA from completing the plan and may result in the application being returned.

- Please include a copy of the illustration when you send in this form.
- Please include a completed customer identification/verification certificate for each planholder
- Please return the completed application form to AXA Administration Centre (Investments), PO box 1810, Bristol, BS99 5SN.



The address for written communication is AXA, PO Box 1810, Bristol, BS99 5SN. The telephone number for communications is 0845 300 0479.
AXA is a worldwide insurance group. In the UK, one of the AXA companies is AXA Sun Life plc, the provider of this plan.
Authorised and regulated by the Financial Services Authority. AXA Sun Life plc is a company limited by shares,
registered in England No. 3291349, registered office: 5 Old Broad Street, London, EC2N 1AD.
As part of our commitment to quality service, telephone calls may be recorded.

Be Life Confident