

# Investment Choice Form

## Irish policies

Action for you to take	See booklet
Get to know the Irish Managed fund, the automatic investment option for your policy. Consider whether this is suitable for your needs.	Section 4
Get to know the Irish Money Market fund: Assess how much risk you want to take with your investment before making a decision.	Section 4
Decide whether you need help or advice before you make your choice.	Section 9
<b>Complete the Investment Choice Form</b>	
▶ <b>Section A:</b> choose the fund(s) you wish to invest in	Section 4
▶ <b>Section B:</b> choose your investment timeline	Section 5
▶ <b>Section C:</b> sign and date the declaration	
<b>Return the form to us in the pre-paid envelope provided by 13 December 2019.</b>	

### Where can I get help?

If you need further details about the Proposal and what it might mean for you, please read the recently issued Decision Pack and Personal Illustration where this is set out in detail.

Call **+44 1296 386 242** (9am to 5pm) or write to us at **Equitable Life, Walton Street, Aylesbury, Buckinghamshire, HP21 7QW**. We can help you understand what you need to consider when making an investment decision, or if you want to discuss other options available under your policy.

For details of the additional support available to you, see **Section 9 of the Investment Choice booklet 'More help with your investment choice'**.

### What happens if I take no action and the Proposal goes ahead?

Your policy would be invested in a secure cash investment for six months after the transfer of the Equitable to become a subsidiary of Utmost Life and Pensions. In the following six months, it would then gradually move to the Irish Managed fund. You could decide to make an investment choice at any time in the future by calling **+44 1296 386 242**.

### What happens if the Proposal does not go ahead?

The value of your with-profits investments would not be increased, your investment guarantee would remain, your policy would not convert from with-profits to unit-linked and the Equitable would not transfer to Utmost Life and Pensions.

The outcome of the vote will be published on the Equitable Life website in November. If you prefer to wait until you know the outcome of the vote before making an investment choice, we encourage you to seek any help or advice you may need before the end of November so that you are ready to make your choice once the outcome is known.

# Investment Choice Form

## Irish policies continued

### Important information

Before you make a decision, you should read the information in your Investment Choice Pack, and consider your personal financial circumstances, goals, and attitude to taking financial risks and potential loss. These investment choices only apply to your with-profits investments when they convert to unit-linked. Any existing unit-linked investments will be unchanged.

<b>Full name</b>	
<b>Address</b>	
<b>Policy number</b>	Pre-populated
<b>Telephone number</b>	
<b>Email address</b>	

### Section A: Your investment fund choice

You can invest in one or both of the following funds. If you wish to choose the automatic investment option, write '100' in the column beside Irish Managed.

Fund Name	% to invest
Irish Managed (the automatic investment option)	
Irish Money Market	
<b>The total in this column must add up to 100%</b>	<b>100%</b>

### Section B: Your investment timeline options

If you do not select a timeline, the six month transition timeline will automatically apply.

Tick one option

	✓	See booklet
<b>Six month transition:</b> Fully invested within six months		<b>Section 5</b>
<b>Three month transition:</b> Fully invested within three months		
<b>One month transition:</b> Fully invested within one month		

## Section C: Declaration

Please sign and date below to confirm your instructions to invest your money in the funds and timeline you have chosen.

Print name

Signature

Date of signature:

**Return this form in the prepaid envelope provided to Equitable Life, Walton Street, Aylesbury, Bucks, HP21 7QW by 13 December 2019** in order for your instructions to be processed at the Implementation Date, if the Proposal is approved. We will still accept forms after this date but your instructions may be processed after the Implementation Date.

For security and training purposes, telephone calls may be recorded.

Authorised by the Prudential Regulation Authority and regulated by the Financial Conduct Authority and the Prudential Regulation Authority.  
Regulated by the Central Bank of Ireland for conduct of business rules.

The Equitable Life Assurance Society is a mutual society registered in England No. 37038 and is a member of Insurance Ireland.  
Registered Office: Walton Street, Aylesbury, Buckinghamshire, HP21 7QW, United Kingdom.

