



**2 Delegation of Power to Investment Adviser** *continued*

- Please indicate the option REQUIRED by initialling the appropriate box (where there are two signatories BOTH must initial) and mark the options you do NOT REQUIRE with one "X" in the appropriate boxes.

*Advice Only*

I hereby authorise my Investment Adviser to have the power to advise only.

*Power to Switch*

I hereby authorise my Investment Adviser to exercise any option relating to switching between funds within my bond. I understand that he/she will therefore have the same power to switch as if they were the bondholder.

**3 Declaration**

- I understand that Utmost PanEurope dac shall not be held liable for any loss caused as a result of this appointment or any actions taken by my Investment Adviser.
- I request that Utmost PanEurope dac accept this nomination until further notice, which must be given in writing to Utmost PanEurope dac at the above address.
- I hereby permit any employee of my Investment Adviser's firm to exercise the power granted above in  Section 2 (tick box if applicable).

First bondholder's signature

Date  /  /

Second bondholder's signature

Date  /  /

First authorised official/trustee's signature

Date  /  /

Second authorised official/trustee's signature

Date  /  /

**4 Authority to change an existing Investment Adviser Fee**

(Only relevant where an Investment Adviser has been appointed prior to 31.12.12)

- I hereby authorise Utmost PanEurope dac to deduct an Investment Adviser Fee from the value of my bond (by the cancellation of units across the bond) and pay the amount deducted to my Investment Adviser as set out below. The Investment Adviser fee is a percentage of the Fund (up to 1.5% each year, in steps of 0.05%).
- I therefore wish Utmost PanEurope dac to accept this authority to deduct an Investment Adviser Fee until further notice. Such notice of termination must be given in writing in advance (minimum one complete calendar month) to Utmost PanEurope dac at the above address.
- I understand that in the case of UK resident individuals that the Investment Adviser Fee will be treated as a partial withdrawal from my policy and will form part of my annual 5% tax deferred withdrawal allowance for tax purposes.

New Investment Adviser Fee to be deducted

 %

(as a percentage of the total fund value)

First bondholder's signature

Date  /  /

Second bondholder's signature

Date  /  /

First authorised official/trustee's signature

Date  /  /

Second authorised official/trustee's signature

Date  /  /

*continued*

## 5 Nomination of Investment Adviser

- I confirm that I agree to act as Investment Adviser for the above detailed policy and I fully understand that this appointment may be terminated by the bondholder(s) upon one month's written notice, and the Investment Adviser Fee, if applicable.

*If an Investment Adviser Fee is to be paid the bondholder(s) must complete Section 4 of this form.*

Investment Adviser's signature

Date

### Privacy Statement

Our Privacy Statement explains when and why we collect personal information about our customers, how we use it, the conditions under which we may share it with others and how we keep it secure. It also explains how long we keep customer information for, how a customer can obtain details of the information we keep and the choices customers have about how we use that information. You can find a copy at [www.utmostinternational.com/privacy-statements/](http://www.utmostinternational.com/privacy-statements/) or you can request a copy from our Customer Service Team.

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[www.utmostinternational.com](http://www.utmostinternational.com)

Calls may be monitored and recorded for training purposes and to avoid misunderstandings.

Utmost PanEurope dac is regulated by the Central Bank of Ireland (No 311420). Its registered office is Navan Business Park, Athlumney, Navan, Co. Meath C15 CCW8, Ireland. Utmost PanEurope dac is a Category A Insurance Permit holder with the Jersey Financial Services Commission.

Utmost Wealth Solutions is registered in Ireland as a business name of Utmost PanEurope dac.

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