

LOST POLICY DECLARATION

BEFORE YOU BEGIN

Complete this form using blue or **black ink** and **BLOCK CAPITALS**. If you make a mistake, cross it out, put in the correct words and sign your initials next to the correction. **Do not use correction fluid.**

If you require any assistance, whilst completing this form, contact our Customer Support team on +44 (0)1624 643 345 or by email at customersupport@utmostwealth.com (for Utmost Limited policies) and 0845 602 9281 or by email at info@utmostwealthsolutions.ie (for Utmost PanEurope dac policies).

SIGNATURE this symbol highlights the signature sections within this form which need to be signed by the policyholders or financial adviser.

WHAT TO DO NEXT

Once complete and depending on your product provider return your form to:

Utmost Limited, Royalty House, Walpole Avenue, Douglas, Isle of Man, IM1 2SL, British Isles.

OR

Utmost PanEurope dac, Ashford House, Tara Street, Dublin 2, D02 VX67, Ireland.

A WEALTH *of* DIFFERENCE

Utmost Wealth Solutions is a trading name used by a number of Utmost companies. Utmost Trustee Solutions is the trading name used by Utmost Trustee Solutions Limited. This item has been issued by Utmost Limited and Utmost PanEurope dac.

The following companies are registered in the Isle of Man: Utmost Limited (No 056473C), Utmost Administration Limited (No 109218C) and Utmost Trustee Solutions Limited (No 106739C) which are regulated or licensed by the Isle of Man Financial Services Authority. Utmost Services Limited (No 059248C) is an appointed representative of Utmost Limited. Each has its registered office at: Royalty House, Walpole Avenue, Douglas, Isle of Man, IM1 2SL, British Isles. Utmost Limited is authorised in the UK by the Financial Conduct Authority (160418).

Utmost PanEuropedac (No 311420), trading as Utmost Wealth Solutions, is regulated by the Central Bank of Ireland. Its registered office is Navan Business Park, Athlumney, Navan, Co. Meath C15 CCW8, Ireland.

Where required, all promotional material has been approved by Utmost Limited which is authorised in the UK by the Financial Conduct Authority.

IMPORTANT INFORMATION

PRIVACY NOTICE

Details about how we use your information, your rights over this information and how you can exercise your rights can be found in the applicable Privacy Notice. We publish our Privacy Notice on our website www.utmostwealth.com or you can contact us on +44 (0)1624 643 345 and request a copy. All persons whose details are collected in this form should read the Privacy Notice to understand how the data provided about them will be used.

LOST POLICY DOCUMENTS

Throughout this document 'the Company' refers to either Utmost Limited or Utmost PanEurope dac, as applicable.

A policy document should not be considered lost until all possible enquiries and searches have been made. Here is a list of places you should look and people you could check with, before completing this form.

This list is not exhaustive and one or more points may not apply in every case.

- › Additional policyholders or additional trustees
- › Your financial adviser
- › Bank/Financial Institution

NON RECEIPT

If your policy was issued less than 6 months ago and the policy document was never received by your financial adviser, your financial adviser can sign the lost policy declaration and return it to us.

If your policy was issued more than 6 months ago, the declaration form will need to be signed by all Policyholders, Trustees or Authorised Signatories.

B DECLARATION

By submitting this form I **confirm and declare** that:

- › If I have ticked the box in section A question 7, I have not received the original policy documentation and that I have no knowledge of its whereabouts
- › If I have NOT ticked the box in section A question 7, I have conducted a thorough search and enquiry and believe to the best of my knowledge that the policy documentation has been lost or destroyed.

C POLICYHOLDER(S)/ADVISER RESPONSIBILITY

If, on a future occasion, the lost document should come into my possession, I will return it immediately to the Company, and I agree to meet and pay on demand to the Company any claim, costs, loss, damage, expense or demands suffered by the Company in consequence of:

- › Issuing a duplicate Policy Schedule or Statement of Benefits in substitution of the original policy document, and/or
- › Making a payment to me under the policy without production of the original policy document, to the Company.

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SIGNATURE

Only applicable if the policy was issued less than 6 months ago and the policy document was never received. For further details, see page 1, under Non Receipt.