

RETIREMENT AND SAVINGS

QUOTATION QUESTIONNAIRE

USING THE EDITABLE FIELDS?

To ensure your information is saved correctly, we recommend you save the form to your desktop before you start completing the required fields.

HOW TO COMPLETE THIS FORM

If completing a hard copy of this form, please use blue or black ink and BLOCK CAPITALS. If you make a mistake cross it out, put in the correct words and initial next to the correction. Do not use correction fluid

PLEASE SEND COMPLETED AND SIGNED FORM TO

Utmost Worldwide Limited

PO Box 613, Utmost House, Hirzel Street, St Peter Port, Guernsey, Channel Islands. GY1 4PA

Retirement&Savings@utmostworldwide.com

A COMPANY DETAILS

1. Full Name
2. Registered address

<input type="text"/>	
<input type="text"/>	
Postcode	Country
3. Telephone Number
4. Fax Number
5. E-mail address
6. Website Address
7. Contact Name(s)

<input type="text"/>
<input type="text"/>
<input type="text"/>
8. Will this plan be dealing with one entity or several?
State number
9. How many potential payrolls will Utmost Corporate Solutions be dealing with?
State number

B RETIREMENT / SAVINGS DEFINED CONTRIBUTION PLAN

STRUCTURE

1. Is this a new plan? Yes No
2. What type of plan is required? Savings Plan Retirement Plan
3. Do you require the plan to be written under trust? Yes No

EMPLOYEE DETAILS

1. How many employees are expected to join the plan at commencement?
2. What will be their normal retirement age? Years

CURRENCY

What currency would you like the plan to be denominated in? US Dollars Sterling Euro

CONTRIBUTIONS

1. What levels of contribution would be provided for this plan?
- Employer** Amount or Salary %
- Employee** Amount or Salary %
2. What is the approximate average annual salary per employee?
3. Will employees make additional contributions on a voluntary basis? Yes No
4. How often will regular contributions be made? Monthly Quarterly Half-Yearly Yearly
5. Will employees be able to make a Transfer In from another plan? Yes No
6. Will the employer have a Transfer In value from another plan? Yes No
- What is the approximate Value?
-

WITHDRAWALS

Will an employee be eligible to make partial withdrawals before their normal retirement age? Yes No

OTHER REQUIREMENTS

Please give us details of any other features you may wish to include in your Retirement / Savings Plan?

ORGANISATIONAL TYPE

- | | | | |
|--------------------------------|--------------------------|---------------------------------|--------------------------|
| Non-Governmental Organisation | <input type="checkbox"/> | Regulated financial Institution | <input type="checkbox"/> |
| Intergovernmental Organisation | <input type="checkbox"/> | Public Limited Company | <input type="checkbox"/> |
| Private Limited Company | <input type="checkbox"/> | Subsidiary | <input type="checkbox"/> |

Charity

Corporate Trustee

Other (Please specify)

Name of Stock Exchange where company was registered, if applicable

Nature of Business

C GROUP LIFE AND DISABILITY PRODUCTS

Also available from Utmost Corporate Solutions are the following Life and Disability products:

GROUP LIFE AND DEPENDANT'S PENSION

Group Life cover provides a Lump Sum Benefit payable:

- › in the event of an Employee's death whilst in service,
- › in the event of death of an Eligible Spouse or Child.

Group Dependant's Pension provides a guaranteed regular income payable in the event of an Employee's death:

- › to an Eligible Spouse,
- › to an Eligible Child or Orphan.

GROUP LONG TERM DISABILITY (LTD)

When an employee is absent from work for a long period of time due to an illness or Accident, Long Term Disability cover provides:

- › An income replacement.
- › Supplementary Benefits to cover pension contributions or insurance premiums.

GROUP TOTAL AND PERMANENT DISABILITY

A Lump Sum Benefit payable in the event of an Employee suffering a Total Permanent Disability whilst in employment. Total Permanent Disability cover can also be available for Eligible Spouses.

GROUP ACCIDENTAL DEATH AND/OR DISMEMBERMENT

To provide a Lump Sum Benefit in the event of an Employee's death due to an Accident or should the Employee suffer a dismemberment as a result of an Accident whilst in employment.

GROUP CRITICAL ILLNESS

To provide a Lump Sum Benefit in the event of an Employee being diagnosed with an insured Critical Illness whilst in employment.

If you require more information or a quotation please email EmployeeBenefits@utmostworldwide.com or visit www.utmostinternational.com

A WORLD *of* DIFFERENCE

www.utmostinternational.com

Utmost Corporate Solutions is a trading name used by Utmost Worldwide Limited.

Utmost Worldwide Limited is incorporated in Guernsey under Company Registration No. 27151 and regulated in Guernsey as a Licensed Insurer by the Guernsey Financial Services Commission under the Insurance Business (Bailiwick of Guernsey) Law, 2002 (as amended), with a registered office at Utmost House, Hirzel Street, St Peter Port, Guernsey, Channel Islands GY1 4PA.

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