

CHANGE OF INVESTMENT RANGE FORM

FOR THE FOLLOWING PRODUCTS

International Investment Bond - Life (IIBL)

International Investment Bond - Redemption (IIBR)

THIS DOCUMENT WAS LAST UPDATED IN FEBRUARY 2020

Please confirm with your financial adviser that this is the most up-to-date document for your product or servicing needs.

Please use BLOCK CAPITALS and black ink only and complete all relevant sections. Please do not use correction fluid; any amendments should be crossed out and initialled by each policyholder. Any incomplete information will need to be confirmed in writing by the policyholder once Utmost International has received this form. If the pages of this document are separated or additional documentation is added, each separate page must be initialled and dated by all the signatories.

All references to Utmost International, we, us and our in this application form mean Utmost International Isle of Man Limited.

Please complete this form if:

- › you have invested in the **GLOBALSELECT** investment range and wish to change to the **SELFSELECT** investment range; or
- › you have invested in the **SELFSELECT** investment range and wish to change to the **GLOBALSELECT** investment range.

A POLICY DETAILS

Policy number

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Full names of policyholder(s)

Please indicate which type of policyholder you are

Individual

Joint

Corporate

Trustee

B INVESTMENT RANGE

I would like to change:

From the **SELFSELECT** investment range
to the

GLOBALSELECT investment range

From the **GLOBALSELECT** investment range
to the

SELFSELECT investment range

NOTE

You can find more information on the **GLOBALSelect** and **SELFSelect** investment ranges in the International Investment Bond product brochure, which is available from your financial adviser.

[illegible]

ASSET IDENTIFIER ISIN	ASSET NAME - IN FULL	INVESTMENT % (WHOLE NUMBERS)
		%
		%
		%
		%
TOTAL		1 0 0

In case we need to clarify the asset choice details, please provide us with the following contact details

Contact name	<input type="text"/>
Contact telephone number including country code	<input type="text"/>
Alternate contact telephone number including country code	<input type="text"/>
E-mail address	<input type="text"/>

Sections D and E should only be completed if you are changing from GLOBALSELECT to SELFSELECT.

For more details please refer to your Policy Terms and Conditions.

D CHARGE DEDUCTION ASSET

The Charge Deduction Asset will be used to pay Portfolio Fund Charges and third party agent and other charges which are outstanding debits in the Transaction Account held with us.

If there is a credit balance in the Transaction Account held with us then we will normally use that value towards payment of your Portfolio Fund Charges.

GLOBALSELECT

If you are now investing in the **GLOBALSELECT** investment range, any debit balance remaining will be cleared by proportionate sale across all assets. This will be regarded as your Charge Deduction Asset. If one or more assets cannot be sold we will proportionately sell the remainder of the assets, except the Transaction Account.

SELFSELECT

If you are now investing in the **SELFSELECT** investment range, any debit balance remaining will continue to be cleared by proportionate sale across all assets, unless otherwise specified below.

Please select one:

Sale of a specific nominated asset - **please specify below**

Sale of the highest value asset at the time

Sale across all assets proportionately

If you are choosing the sale of a specific nominated asset, please provide details of this asset below:

Asset identifier ISIN

Asset name

If it is not possible to sell from the Charge Deduction Asset either you, your Fund Adviser or the Discretionary Asset Manager have 30 days from the quarterly valuation date to provide us with a new instruction. If any debit remains in the Transaction Account after 30 days and the debit balance is more than our maximum allowable debit limit, we have the right to sell from the highest value asset in order to clear the debit balance. For full details please refer to the Policy Terms and Conditions.

E NOMINATED ASSET FOR REGULAR WITHDRAWALS**GLOBALSELECT**

If you are now investing in the **GLOBALSELECT** investment range, your regular withdrawals will be funded by proportionate sale across all assets. If one or more assets cannot be sold we will proportionately sell the remainder of the assets, except the Transaction Account.

SELFSELECT

If you are now investing in the **SELFSELECT** investment range, your regular withdrawals will continue to be funded by proportionate sale across all assets, unless otherwise specified below.

Please select one:

Proportionate sale across all assets

Sale of specific nominated asset(s) - **please specify below**

If you have chosen the sale of specific nominated asset(s), please state which specific asset(s) is/are to be used.

ISIN												Name			%	
ISIN												Name			%	
ISIN												Name			%	
ISIN												Name			%	
ISIN												Name			%	
												TOTAL	1	0	0	%

If we are unable to sell from the Nominated Asset you, your Fund Adviser or the Discretionary Asset Manager must send us a new instruction for a Nominated Asset before the next regular withdrawal due date. If we do not receive this, your regular withdrawal will not be paid.

F POLICYHOLDER(S) SIGNATURE(S)

This form must be signed by all policyholders or the Lead Policyholder. Where the policyholders are individual trustees, all trustees must sign. Where the policyholder is a company (including corporate trustees), the required number of authorised signatories must sign.

SIGNATURE

Full name

Capacity

Date

d	d	m	m	y	y	y	y
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d	d	m	m	y	y	y	y
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SIGNATURE

Full name

Capacity

Date

d	d	m	m	y	y	y	y
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d	d	m	m	y	y	y	y
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Important note: The product(s) named in this document and to which this document relates is accurate as at December 2021 and is subject to change.
To ensure applicability with respect to a product and, if applicable, a related policy, before taking any action, please liaise with your adviser and/or contact us directly.

A WEALTH *of* DIFFERENCE

www.utmostinternational.com

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

Utmost International Isle of Man Limited is registered in the Isle of Man under number 24916C.

Registered Office: King Edward Bay House, King Edward Road, Onchan, Isle of Man, IM99 1NU, British Isles.

Tel: +44 (0)1624 655 555 Fax: +44 (0)1624 611 715. Licensed by the Isle of Man Financial Services Authority.

Utmost Wealth Solutions is registered in the Isle of Man as a business name of Utmost International Isle of Man Limited.

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