



**D DETAILS OF ASSIGNEE(S)**

Please give details of any person or company to whom the Account has been assigned or otherwise charged as security.

Full name of Assignee(s)

Address of Assignee(s)

Postcode	Country
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**E DELEGATED AUTHORITY**

The undersigned as Account Owner (which expression where there is more than one Account Owner shall mean all Account Owners) hereby:

- a. Confirms that the Account Owner is legally entitled to effect any of the options or elections contained in the Terms applicable to the policies in the Account.
- b. Authorises the Authorised Person named in Section B to exercise on behalf of the Account Owner any of the options available under the Terms applicable to the policies in the Account relating to the investment allocations and/or investment conversion.
- c. Confirms that he/she is satisfied that the Authorised Person is duly authorised to exercise such discretionary powers and that the exercise of these elections shall be the absolute discretion of the Authorised Person and further that Utmost International is in no way responsible for any of the consequences arising as a result of:
  - i. the Authorised Person not being so authorised, and
  - ii. the exercise or failure to exercise the elections by the Authorised Person.
- d. Undertakes to ratify the exercise of any election effected by the Authorised Person.
- e. Confirms that this Authority shall continue in force and effect until such time as written notice of cancellation by the Account Owner is received by Utmost International at its office: King Edward Bay House, King Edward Road, Onchan, Isle of Man, IM99 1NU, British Isles.

Please note that we may require verification of identity of the Authorised Person.

**Account Owner(s) (including Additional Trustees, where applicable)**

**SIGNATURE(S)**

Date

**Assignee(s) (see Note)**

**SIGNATURE(S)**

Date

Note: if the Account has been assigned, the Assignee(s) must also sign the Authority.

**F APPOINTEE(S) CONFIRMATION**

The Appointee(s) hereby confirm(s) to Utmost International that:

- a. The Authorised Person, where applicable, is authorised for the purposes of the Financial Services and Markets Act 2000 to carry out the powers granted hereby and
- b. They are empowered by the Authorised Person to effect the powers granted hereby on its behalf.

**SIGNATURE(S)**

**Appointee(s)**



Date

d	d	m	m	y	y	y	y
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**G DATA PRIVACY INFORMATION**

We collect and process Personal Data from you, your employees and financial advisers and your appointed representatives, their employees and financial advisers, in order to communicate with you, provide you with services and/or for business administration purposes.

We collect the following types of data:

- a. your name
- b. address and other contact details
- c. financial details (e.g., for fees and commission)
- d. information about your health or dietary requirements (please note we will only collect such sensitive information in relation to the provision of certain services, e.g., seminars).

We may share your data, by electronic or other means to:

- a. other companies within the Utmost group of companies, where it is used for assessment and statistical analysis purposes and for purposes connected with Products
- b. a third party to verify your identity in line with anti-money laundering or other requirements
- c. third parties who provide services to us (e.g., IT services, research and marketing services and for statistical and analytical purposes)
- d. third parties where required by law, court order or regulation
- e. other organisations, including the police or fraud prevention agencies and databases, to prevent and detect fraud.

If we need to transfer your personal information to another country for processing or storage, we ensure that anyone to whom we pass your personal information agrees to treat your information with the same level of protection as we would.

We will always keep your data safe and secure. We will never sell your data, and we will not send you communications about unrelated services without your consent.

Our full Privacy Notice holds much more information about how we collect, use and share your personal data and that of your clients and it provides information about the rights that you and your clients have in relation to your and their personal data, and how to contact us if you have any concerns.

Please go to [www.utmostinternational.com/privacy-statements/](http://www.utmostinternational.com/privacy-statements/) or write to:

For Utmost International Isle of Man Limited: The Data Protection Officer, Utmost International Isle of Man Limited, King Edward Bay House, King Edward Road, Onchan, Isle of Man, British Isles, IM99 1NU.

For Utmost PanEurope dac: The Data Protection Officer, Utmost PanEurope dac, Navan Business Park, Athlumney, Co Meath, C15 CCW8, Ireland.

**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](http://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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