

Notice of Assignment Form

This form is to be completed by every Policyholder if they wish to assign the Policy to another individual or to another entity.

Policy number: _____
Policyholder: _____

Parties
Policyholder (Assignor): _____
Assignee: _____
Second Assignee (if any): _____
Irrevocable Beneficiary (if any): _____
Please note that if the Life Assured/Lives Assured on the Policy is/are to change as part of this assignment a separate notification is required to be made to Utmost PanEurope. Please contact ccsfrontoffice@utmost.ie for more information.

Terms
By signing this Notice of Assignment form the Policyholder gives Utmost PanEurope dac (Utmost PanEurope) notice that it wishes to assign the Policy to the Assignee as described below.
A copy of the deed of assignment has been provided to Utmost PanEurope together with this Notice of Assignment form.
Identification documentation for the Assignee(s) as listed in appendix 1 must be provided to Utmost PanEurope so that due diligence may be conducted.
Utmost PanEurope will provide the Policyholder with a confirmation to acknowledge receipt of notice and to confirm that it has recorded the assignment. The assignment will not be processed until Utmost PanEurope has completed due diligence on the proposed Assignee(s) and approved the assignment in writing.
The original Terms and Conditions of the Policy will change in accordance with the terms outlined above.

Assignment
Please tick one box only
<input type="checkbox"/> Full assignment. The Policyholder intends to assign the Policy to the Assignee(s) and will no longer have ownership of the Policy.
<input type="checkbox"/> Partial assignment – Joint ownership. The Policyholder intends to make themselves a joint Policyholder with the Assignee(s) so each Policyholder has equal rights.
<input type="checkbox"/> Partial assignment – Split ownership. The Policyholder assigns a part of the Policy as described in the enclosed deed of assignment to the Assignee(s) and they no longer have ownership of that part of the Policy.

(Continued overleaf)

Notice of Assignment Form (continued)

Declaration of Life Assured

The Life Assured/Lives Assured of the Policy declare(s) to be aware of the assignment of the Policy described in this form and consents to it:

Name: _____ Name: _____

Signature of first Life Assured:

Signature of second Life Assured (if any):

Date:

Date:

If there are more than two Lives Assured, please include their names and signatures on a separate copy of this page.

Declaration

My signature below is confirmation that:

- I obtained independent tax and legal advice before signing the deed of assignment and this Notice of Assignment
- I understand the legal and tax consequences of this assignment and any changes the assignment may make to my rights, interests and obligations
- I have discharged or will discharge any stamp duty or other tax obligations for which I may be responsible arising out of the assignment
- I have entered into a valid deed of assignment and I agree to be bound by its terms and the terms of this Notice of Assignment
- I understand this Notice of Assignment provided to Utmost PanEurope does not replace the deed of assignment but allows Utmost PanEurope to record it and conduct appropriate due diligence on the Assignee and make such other enquiries as Utmost PanEurope sees fit
- I consent to my personal data being processed by Utmost PanEurope in accordance with Irish law for the purposes of completing the assignment.

Signature of first Policyholder:

Signature of second Policyholder (if any):

Date:

Date:

(Continued overleaf)

Notice of Assignment Form (continued)

Declaration (continued)

Signature of first Assignee:

Signature of second Assignee (if any):

Date:

Date:

In the following circumstances additional signatures are required:

- If an irrevocable Beneficiary has been appointed.
- If the Policy has been pledged or transferred to another party that another party's consent is required.

Name: _____

Name: _____

Signature:

Signature:

Date:

Date:

(Continued overleaf)

Notice of Assignment Form (continued)

Appendix 1

The following documents must be provided by the Assignee:

- A copy of the deed of assignment
- An International Tax Compliance form
- An original or true certified copy of an accepted and valid identification document with the date of birth
- An original or true certified copy of an accepted proof of address dated within the last 6 months.

Utmost PanEurope dac

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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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