

AUTHORISED CUSTODIAN INTERNET SERVICE REQUEST



UTMOST INTERNATIONAL ISLE OF
MAN LIMITED/UTMOST PANEUROPE DAC

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.

All references to Utmost International mean both Utmost International Isle of Man Limited and Utmost PanEurope dac.

Note: This section should be completed to request access to the view only internet service ('Internet Service') provided by the Authorised Custodian. If access is required to more than one Authorised Custodian, please complete an additional form.

A CUSTODIAN DETAILS

Name of the Authorised Custodian

in respect of the account ('the Account') opened with the Custodian.

Address of Custodian

Policy number

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Name of Company/Corporate
Policyholder (if applicable)

Name of Trust (if applicable)

If there are more than two policyholders, please copy and attach additional pages as necessary and tick here

B POLICYHOLDER DETAILS

| | Details of Policyholder/ Authorised Signatory/Trustee 1 | Details of Policyholder/ Authorised Signatory/Trustee 2 |
|--|--|--|
| Does Policyholder 1 require view only access to the Internet Service provided by the Custodian? | Yes | No |
| Does Policyholder 2 require view only access to the Internet Service provided by the Custodian? | Yes | No |
| Title (✓) | <div style="display: flex; justify-content: space-between; margin-bottom: 5px;"> Mr Mrs Miss </div> <div style="display: flex; justify-content: space-between;"> Other <input style="width: 150px; border: 1px solid #ccc;" type="text"/> </div> | <div style="display: flex; justify-content: space-between; margin-bottom: 5px;"> Mr Mrs Miss </div> <div style="display: flex; justify-content: space-between;"> Other <input style="width: 150px; border: 1px solid #ccc;" type="text"/> </div> |
| Full forename(s) | <input style="width: 100%; border: 1px solid #ccc;" type="text"/> | <input style="width: 100%; border: 1px solid #ccc;" type="text"/> |
| Surname | <input style="width: 100%; border: 1px solid #ccc;" type="text"/> | <input style="width: 100%; border: 1px solid #ccc;" type="text"/> |
| Address | <input style="width: 100%; border: 1px solid #ccc;" type="text"/> <input style="width: 100%; border: 1px solid #ccc;" type="text"/> <input style="width: 100%; border: 1px solid #ccc;" type="text"/> <input style="width: 100%; border: 1px solid #ccc; color: #ccc;" type="text"/> | <input style="width: 100%; border: 1px solid #ccc;" type="text"/> <input style="width: 100%; border: 1px solid #ccc;" type="text"/> <input style="width: 100%; border: 1px solid #ccc;" type="text"/> <input style="width: 100%; border: 1px solid #ccc; color: #ccc;" type="text"/> |
| Telephone | <input style="width: 100%; border: 1px solid #ccc;" type="text"/> | <input style="width: 100%; border: 1px solid #ccc;" type="text"/> |
| E-mail | <input style="width: 100%; border: 1px solid #ccc;" type="text"/> | <input style="width: 100%; border: 1px solid #ccc;" type="text"/> |
| <p>Does the Policyholder(s) wish third party/parties to have view only access to the Internet Service provided by the Custodian, for example a Financial Adviser?</p> <div style="display: flex; justify-content: flex-end; gap: 20px;"> Yes No </div> | | |

C THIRD PARTY DETAILS

| | Details of FIRST third party requiring access | Details of SECOND third party requiring access |
|------------------|--|--|
| Title (✓) | <div style="display: flex; justify-content: space-between; margin-bottom: 5px;"> Mr Mrs Miss </div> <div style="display: flex; justify-content: space-between;"> Other <input style="width: 150px; border: 1px solid #ccc;" type="text"/> </div> | <div style="display: flex; justify-content: space-between; margin-bottom: 5px;"> Mr Mrs Miss </div> <div style="display: flex; justify-content: space-between;"> Other <input style="width: 150px; border: 1px solid #ccc;" type="text"/> </div> |
| Full forename(s) | <input style="width: 100%; border: 1px solid #ccc;" type="text"/> | <input style="width: 100%; border: 1px solid #ccc;" type="text"/> |
| Surname | <input style="width: 100%; border: 1px solid #ccc;" type="text"/> | <input style="width: 100%; border: 1px solid #ccc;" type="text"/> |
| Address | <input style="width: 100%; border: 1px solid #ccc;" type="text"/> <input style="width: 100%; border: 1px solid #ccc;" type="text"/> <input style="width: 100%; border: 1px solid #ccc;" type="text"/> <input style="width: 100%; border: 1px solid #ccc; color: #ccc;" type="text"/> | <input style="width: 100%; border: 1px solid #ccc;" type="text"/> <input style="width: 100%; border: 1px solid #ccc;" type="text"/> <input style="width: 100%; border: 1px solid #ccc;" type="text"/> <input style="width: 100%; border: 1px solid #ccc; color: #ccc;" type="text"/> |
| Telephone | <input style="width: 100%; border: 1px solid #ccc;" type="text"/> | <input style="width: 100%; border: 1px solid #ccc;" type="text"/> |
| E-mail | <input style="width: 100%; border: 1px solid #ccc;" type="text"/> | <input style="width: 100%; border: 1px solid #ccc;" type="text"/> |

I confirm that the third party/parties understand and accept that their data will be passed onto Utmost International Isle of Man Limited/Utmost PanEurope dac and the custodians

D INTERNET SERVICE REQUEST AND DECLARATION

1. I request to be connected and/or, if applicable where I have named a third party, I request you to connect the named third party to the Internet Service provided by the Custodian.
2. I request you forward this request to the Custodian.
3. I confirm that I have received, read, understood and agree to the terms on which the Custodian is prepared to offer me and any named third party, the Internet Service. By allowing the named third party to access the Internet Service on my behalf, I understand that I am responsible for the actions of that third party.
4. I accept that Utmost International Isle of Man Limited/Utmost PanEurope dac is not responsible for any losses that may be suffered directly or indirectly as a result of me or (if applicable) the named third party using the Internet Service and I understand that any losses incurred may be taken from the value of my Contract.
5. I understand that the Custodian will contact me or the named third party directly to arrange access to their Internet Service.
6. I understand that it is recommended that I seek legal and taxation advice on the consequences of me, or if applicable the named third party, using the Internet Service.
7. If the policyholder is a Company/Corporate entity and if applicable, I confirm that delegation of the Company's powers to the individual/third party requiring access is within the powers available to the director(s) under the constitutional documents of the Company.
8. I confirm that delegation of the trustees' powers to the individual/third party requiring access is within the powers available to the trustees under the trust (if applicable).

SIGNATURE

**Signature of Policyholder/
Authorised Signatory/Trustee 1**

Date

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Print name

**Signature of Policyholder/
Authorised Signatory/Trustee 2 (if any)**

| | | | | | | | |
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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 Hong Kong Office: Unit 2402C, Great Eagle Centre, 23 Harbour Road, Wanchai, Hong Kong.
Tel: +852 3552 5888 Fax: +852 3552 5889. Authorised by the Insurance Authority of Hong Kong to carry on long-term business.

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.

Utmost PanEurope dac is regulated by the Central Bank of Ireland. Registered No 311420.
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Utmost Wealth Solutions is registered in Ireland as a business name of Utmost PanEurope dac.

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