

# REQUEST FOR UTMOST INTERNATIONAL TO RESTRICT ASSETS

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THIS FORM IS ONLY FOR USE WITH THE FOLLOWING POLICY TYPES

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European Wealth Bond (Life & Redemption versions)

International Wealth Bond (Life & Redemption versions)

## 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.

THIS DOCUMENT WAS LAST UPDATED IN NOVEMBER 2020.

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

If we accept this request and on completion of the removal of any non-permissible assets your Policy Terms will be irrevocably amended as described in Appendix 1 in Part C of your terms.

All references to Utmost International in this form mean Utmost International Isle of Man Limited or Utmost PanEurope dac.

When completing this form, please use BLOCK CAPITALS and blue/black ink only and complete all relevant sections. Please do not use correction fluid; any amendments should be crossed out and initialled by all policyholders.

**Before completing this form please read Appendix 1 in Part C of the Policy Terms and speak with your financial adviser as once Utmost International restrict the assets, it is not possible for this to be reversed at a later date. You should understand the implications of restricting the asset range on your policy, and why you may wish to make such a request, for example, to enable you to decide on the management of the assets linked to your policy.**

Where your Policy Terms do not include Part C, if we accept your request to restrict the assets, your Policy Terms will be endorsed so that the Policy Terms in the link below will apply to your Policy Terms. Please read the Term amendments in Appendix 1 in Part C of the following Policy Terms which can be found here [www.utmostinternational.com](http://www.utmostinternational.com) before making the request.

- › [European Wealth Bond - PRIIPs](#)
- › [European Wealth Bond - Redemption](#)
- › [International Wealth Bond - Life](#)
- › [International Wealth Bond - Redemption](#)

DETAILS OF THE BOND

Utmost International policy number	<input type="text"/>		
Type (✓)	Individual	Trustee	Corporate
Policyholder name	1 <input type="text"/>		2 <input type="text"/>
Policyholder address/registered office address	<input type="text"/> <input type="text"/> <input type="text"/> Postcode Country		<input type="text"/> <input type="text"/> <input type="text"/> Postcode Country
Date of birth	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>		<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>

**Request to restrict assets within the European Wealth Bond or International Wealth Bond**

By completing this form, you request Utmost International to restrict the asset range in your European Wealth Bond/ International Wealth Bond to those which fall within section 520 of the UK Income Tax (Trading and Other Income Act) 2005 or successor legislation. If we agree to your request to restrict the assets, then we will inform you of this. We will instruct the discretionary asset manager to sell any Asset and not make any further investment into any Asset which do not fall within section 520 of the UK Income Tax (Trading and Other Income Act) 2005 or successor legislation. Once the sale proceeds from the last Asset sold has been credited to the relevant transaction account, Appendix 1 in Part C of the Policy Terms will apply which will allow you to request for a fund adviser or discretionary asset manager to be appointed on a discretionary or advisory basis by completing the relevant form.

**The asset restriction is irreversible, so please ensure you read Appendix I in Part C of the Policy Terms and also speak with your financial adviser before making this request.**

By signing below you are providing your confirmation and acceptance of the instruction provided in this form, and you understand that if we agree to this request, the asset restriction is irreversible and Appendix I in Part C of the Policy Terms will apply to your Policy. All policyholder(s) must sign.

<b>SIGNATURE</b>	<b>Signature 1</b>	<b>Signature 2</b>
	<input type="text"/>	<input type="text"/>
	Full name	<input type="text"/>
Date	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>

<b>SIGNATURE</b>	<b>Signature 3</b>	<b>Signature 4</b>
	<input type="text"/>	<input type="text"/>
	Full name	<input type="text"/>
Date	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>

Utmost International does not offer legal, tax or financial advice and we can accept no responsibility for any action taken or refrained from on the basis of information provided by us. Any information provided is based on our understanding of the current law and practice and is subject to change in the future.

**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.utmmostinternational.com](http://www.utmmostinternational.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.

Utmost PanEurope dac is regulated by the Central Bank of Ireland. Registered No 311420.

Administration Centre for correspondence: King Edward Bay House, King Edward Road, Onchan, Isle of Man, IM99 1NU, British Isles.

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Utmost Wealth Solutions is registered in Ireland as a business name of Utmost PanEurope dac.

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