

REQUEST FOR UTMOST WEALTH SOLUTIONS TO RESTRICT ASSETS

Utmost Wealth Solutions is the brand name used by a number of Utmost companies. This item has been issued by Utmost International Isle of Man Limited and Utmost PanEurope dac.

THIS FORM IS ONLY FOR USE WITH THE FOLLOWING POLICY TYPES

European Wealth Bond (Life & Redemption versions)

International Wealth Bond (Life & Redemption versions)

The policy must contain the relevant Part C in the policy terms as detailed in this form.

THIS DOCUMENT WAS LAST UPDATED IN DECEMBER 2025.

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

HOW TO COMPLETE THIS FORM

Paper completion

Please complete this form using blue or black ink and BLOCK CAPITALS. If you make a mistake, cross it out, put in the correct words and sign your initials next to the correction. Do not use correction fluid.

Electronic completion

To ensure your information is saved correctly, we recommend you save the form to your desktop before you start completing the required fields.

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.

Before completing this form please read Appendix 1 in Part C of the Policy Terms and speak with your financial adviser as once Utmost Wealth Solutions 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.

DETAILS OF THE BOND

Utmost Wealth Solutions 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"/> d d m m y y y y		<input type="text"/> d d m m y y y y

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

By completing this form, you request Utmost Wealth Solutions 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.

	Signature 1	Signature 2
SIGNATURE	<input style="width: 100%; height: 40px;" type="text"/>	<input style="width: 100%; height: 40px;" type="text"/>
Full name	<input style="width: 100%; height: 25px;" type="text"/>	<input style="width: 100%; height: 25px;" type="text"/>
Date	<input style="width: 100%; height: 20px;" type="text" value="d d m m y y y y"/>	<input style="width: 100%; height: 20px;" type="text" value="d d m m y y y y"/>
	Signature 3	Signature 4
SIGNATURE	<input style="width: 100%; height: 40px;" type="text"/>	<input style="width: 100%; height: 40px;" type="text"/>
Full name	<input style="width: 100%; height: 25px;" type="text"/>	<input style="width: 100%; height: 25px;" type="text"/>
Date	<input style="width: 100%; height: 20px;" type="text" value="d d m m y y y y"/>	<input style="width: 100%; height: 20px;" type="text" value="d d m m y y y y"/>

Utmost Wealth Solutions 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.

A WEALTH *of* DIFFERENCE