

US PERSON DECLARATION

Please complete this declaration if you are a US Person and you are applying for a new Plan with Utmost Worldwide Limited, or if you are applying for an increase/top-up in relation to an existing Plan (where this declaration has not already been made).

Name of Applicant(s):

Name of Product for which
you are applying:

- › I do not intend to become resident in the US while holding this product and I understand the consequences of doing this.
- › I confirm that I understand the United States (US) tax consequences of my investment in the above product, which are my responsibility. I understand that depending on my circumstances, the product that I am applying for may be subject to higher taxation within the US than an equivalent product from a domestic US provider.
- › I will not hold Utmost Worldwide Limited liable for any adverse US tax consequences suffered by me as a result of my investment in the product. I also understand that Utmost Worldwide Limited does not provide taxation or financial advice.
- › I understand that Utmost Worldwide Limited is required to disclose information on my holding in the product to the US authorities under the Foreign Account Tax Compliance Act (FATCA).
- › I undertake to pay any annual tax liability, State Premium Tax, Federal Excise Tax or any other State or Federal taxes that may be due under the product. In the event that Utmost Worldwide Limited is pursued for any such taxes by the United States, I hereby permit Utmost Worldwide Limited to settle the liability from the assets linked to the product and indemnify Utmost Worldwide Limited against the liability, together with any associated costs.
- › I confirm that I understand the importance of obtaining qualified independent taxation advice and I am aware of any potential taxation implications and reporting or disclosure obligations that may apply for reporting of my holdings.

Signature of First Applicant:

SIGNATURE

Date:

d	d	m	m	y	y	y	y
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Signature of Second Applicant: (if applicable)

SIGNATURE

Date:

d	d	m	m	y	y	y	y
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I confirm that the applicant has obtained necessary advice in relation to US taxation and that there is no known material detriment to them in holding the Utmost Worldwide Limited product due to US taxation rules.

Intermediary Signature:

SIGNATURE

Date:

d	d	m	m	y	y	y	y
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Intermediary Company Name:

A WEALTH *of* DIFFERENCE

Utmost Wealth Solutions is the trading name used by Utmost Worldwide Limited and a number of Utmost companies.

Utmost Worldwide Limited is incorporated in Guernsey under Company Registration No. 27151 and regulated in Guernsey as a Licensed Insurer by the Guernsey Financial Services Commission under the Insurance Business (Bailiwick of Guernsey) Law, 2002 (as amended).

Registered Head Office: Utmost Worldwide Limited, Utmost House, Hirzel Street, St Peter Port, Guernsey, Channel Islands GY1 4PA.

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Websites may make reference to products that are not authorised or regulated and/or are not available for offering to planholders in certain jurisdictions.

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