

# RETURN TO THE UK FORM

## WEALTH MANAGEMENT PORTFOLIO

### BEFORE YOU BEGIN

You should complete this form if you have moved back to the United Kingdom.

Please complete all relevant sections of this form by typing in the fields. Once complete, print and sign using a pen.

Alternatively, print and complete in **BLOCK CAPITALS** using **blue or black ink**.

If any of the information on this form needs to be changed, it should be initialled by all policyholders.

### WHAT TO DO WHEN YOU HAVE COMPLETED THIS FORM

Return the completed form by post to Utmost PanEurope dac.

**Utmost PanEurope dac, Ashford House, Tara Street, Dublin 2, D02 VX67, Ireland.**

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### IMPORTANT INFORMATION

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### HOW WE USE YOUR INFORMATION

Our Privacy Statement explains when and why we collect personal information about our customers, how we use it, the conditions under which we may share it with others and how we keep it secure. It also explains how long we keep customer information for, how a customer can obtain details of the information we keep and the choices customers have about how we use that information. You can find a copy at [www.utmostwealth.com/privacy-statement](http://www.utmostwealth.com/privacy-statement) or you can request a copy from our Client Relations Team.

## A WEALTH *of* DIFFERENCE

Utmost Wealth Solutions is a trading name used by a number of Utmost companies. Utmost Trustee Solutions is the trading name used by Utmost Trustee Solutions Limited. This item has been issued by Utmost PanEurope dac.

The following companies are registered in the Isle of Man: Utmost Limited (No 056473C), Utmost Administration Limited (No 109218C) and Utmost Trustee Solutions Limited (No 106739C) which are regulated or licensed by the Isle of Man Financial Services Authority. Utmost Services Limited (No 059248C) is an appointed representative of Utmost Limited. Each has its registered office at: Royalty House, Walpole Avenue, Douglas, Isle of Man, IM1 2SL, British Isles. Utmost Limited is authorised in the UK by the Financial Conduct Authority (160418).

Utmost PanEurope dac (No 311420), trading as Utmost Wealth Solutions, is regulated by the Central Bank of Ireland. Its registered office is Navan Business Park, Athlumney, Navan, Co. Meath C15 CCW8, Ireland.

All promotional material has been approved by Utmost Limited who is authorised in the UK by the Financial Conduct Authority.

**A** RETURNING TO THE UK

To comply with our reporting obligations to the Irish Revenue we need your taxpayer identification number and jurisdiction of tax residence. If in the future your tax residency changes, please complete our **Tax Information Exchange Pack**.

Bond number

Full name of policyholder(s)	Date of birth (dd/mm/yyyy)	Taxpayer identification number(s)*	Jurisdiction(s) of tax residence**

\*Taxpayer identification number - this is the number that the tax authority uses to identify you. For example, in the UK it would be your National Insurance number or your company tax number.

\*\*Please give details of all tax jurisdictions you are resident in.


Telephone number

Email address

1 What date did you return to the UK?

2 Your new UK address

Postcode

 You should enclose a copy of an original certified, signed and dated, proof of address document (for example, a utility bill) dated within the last six months. The document can be certified by a financial adviser, solicitor or police officer.

**B** REMOVAL OF UCITS RESTRICTIONS (SPAIN ONLY)

You only need to complete this section if you want to remove the Undertakings for Collective Investments in Transferable Securities (UCITS) restriction from your bond.

The removal of the UCITS restriction from your bond may have implications if you decide to move back to Spain in the future.

For more information on this, please refer to your policy conditions and key features documents and speak to your financial adviser.

Tick this box to confirm that you want to remove the UCITS restriction from your bond.

If you have appointed an investment manager and have chosen to remove the UCITS restriction, you will have to complete a new **'Investment Services Appointment Form'**.

**C** DECLARATION

I/We declare that the information completed in this section is true to the best of my/our knowledge and belief.

I am/We are the policyholder in respect of which this declaration is being made.

I/We hereby undertake to inform you of any change in my/our country of residence and or jurisdiction of tax residence during the life of the policies.

	Policyholder 1	Policyholder 2	
<b>SIGNATURE</b>	<input type="text"/>	<input type="text"/>	<b>SIGNATURE</b>
Print full name	<input type="text"/>	<input type="text"/>	
	<input type="text"/>	<input type="text"/>	
Date	<input type="text" value="d d m m y y y y"/>	<input type="text" value="d d m m y y y y"/>	
<b>SIGNATURE</b>	<input type="text"/>	<input type="text"/>	<b>SIGNATURE</b>
Print full name	<input type="text"/>	<input type="text"/>	
	<input type="text"/>	<input type="text"/>	
Date	<input type="text" value="d d m m y y y y"/>	<input type="text" value="d d m m y y y y"/>	