

CHANGE OF DISCRETIONARY INVESTMENT STRATEGY FORM

UTMOST PANEUROPE DAC

INTRODUCTION

This form is to be completed if you wish to change the discretionary investment strategies underlying your Policy.

This document contains links to relevant documents, websites and email addresses. Click on the **bold gold** words to access these links.

USING THE EDITABLE FIELDS

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.

Paper completion: If completing a hard copy of this form, please use black or blue 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.

IMPORTANT INFORMATION

DATA PROTECTION

Before you provide us with your personal information, please read our **Privacy Notice** available on our website at utmostinternational.com/privacy-statements/ for information about your data protection rights and how we use your personal data. **You should only provide personal information about another individual in this form where you have received their consent to do so.** Utmost PanEurope reserves the right to change the **Privacy Notice** from time to time. We encourage you to periodically review the **Privacy Notice** to keep informed about how we use your personal data and how we keep it protected.

WHERE TO SUBMIT COMPLETED FORMS

You can email digitally signed and/or scanned forms and supporting evidence, to us at: CCSFrontOffice@utmost.ie
Alternatively, post paper forms and supporting evidence to: **Utmost PanEurope dac, Navan Business Park, Athlumney, Navan, County Meath C15 CCW8, Ireland.**

A POLICY DETAILS

First Policyholder name	<input type="text"/>
Second Policyholder name (if any)	<input type="text"/>
Third Policyholder name (if any)	<input type="text"/>
Fourth Policyholder name (if any)	<input type="text"/>

B TYPE OF CHANGE REQUESTED

Change of investment strategy only

Change of investment strategy in association with an additional investment

C UPDATED INVESTMENT STRATEGY ALLOCATION

Use the table below to indicate the investment strategy(ies) to which you want your Policy to be allocated. If you are re-allocating your existing investment strategy to several investment strategies please indicate the percentage of the value to allocate to each investment strategy. If part of the value should remain in an existing investment strategy please include the existing strategy in the table.

INVESTMENT STRATEGY	PORTFOLIO MANAGER (NAME AND ADDRESS)	% OF VALUE ALLOCATED					
	<table border="1" style="width: 100%; border-collapse: collapse;"> <tr><td style="height: 20px;"> </td></tr> <tr><td style="height: 20px;"> </td></tr> <tr><td style="height: 20px;"> </td></tr> <tr> <td style="width: 50%;">Postcode</td> <td style="width: 50%;">Country</td> </tr> </table>				Postcode	Country	%
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Postcode	Country						

D PORTFOLIO MANAGER CHARGES

Indicate charges payable to the relevant Portfolio Manager in respect of the new Discretionary Investment Strategies.

INVESTMENT STRATEGY	PORTFOLIO MANAGER	PORTFOLIO MANAGEMENT CHARGE (P.A.)	PERFORMANCE CHARGE (P.A.)	EXIT CHARGES	INVESTMENT STRATEGY TO BE USED TO PAY CHARGES YES/NO
		%	%	%	
		%	%	%	
		%	%	%	
		%	%	%	

If the charge structure is not categorised above please note the details of the agreed charge below.

E DECLARATIONS

References to 'I, me' or 'my', mean you, the Policyholder (including individuals acting on behalf of a Trust or entity).

My signature below is confirmation that I:

- › request Utmost PanEurope to change the Discretionary Investment Strategy applied to my Policy as described in this form;
- › have received, examined, understood and accepted the content of this form and the content of the document provided by the Portfolio Manager describing the Discretionary Investment Strategy offered;
- › acknowledge that the allocation between the different Discretionary Investment Strategies will vary according to performance over time;
- › acknowledge that Utmost PanEurope have discretion to accept this request;
- › acknowledge that if accepted the request above will be effective from the date indicated in the confirmation Utmost PanEurope send me;
- › understand that my request will be processed by Utmost PanEurope on the first available date after receipt of the instructions;
- › am aware that I am not permitted to communicate with the Portfolio Manager in relation to the selection of individual assets associated with this investment strategy and that the Portfolio Manager is solely responsible for the selection of the individual assets in line with this investment strategy; and
- › understand that market fluctuations and the time taken to process the request may result in a different percentage allocation than indicated in the instructions provided.

	Policyholder 1	Policyholder 2 (if any)
SIGNATURE	<input style="width: 100%; height: 40px;" type="text"/>	<input style="width: 100%; height: 40px;" type="text"/>
Print full name	<input style="width: 100%; height: 30px;" type="text"/>	<input style="width: 100%; height: 30px;" 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"/>

	Policyholder 3 (if any)	Policyholder 4 (if any)
SIGNATURE	<input style="width: 100%; height: 40px;" type="text"/>	<input style="width: 100%; height: 40px;" type="text"/>
Print full name	<input style="width: 100%; height: 30px;" type="text"/>	<input style="width: 100%; height: 30px;" 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"/>

In certain jurisdictions, the signature of the Policyholder's spouse is required, if the Policyholder and their spouse are subject to a joint matrimonial regime and the spouse is not a joint Policyholder.

	Spouse
SIGNATURE	<input style="width: 100%; height: 40px;" type="text"/>
Print full name	<input style="width: 100%; height: 30px;" type="text"/>
Date	<input style="width: 100%; height: 20px;" type="text" value="d d m m y y y y"/>

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If the Policy has been assigned, pledged as security, or otherwise given to any person (e.g. irrevocable beneficiary, etc.) who could have a claim under the Policy, that person must sign below.

SIGNATURE

Capacity of signatory

Assignee Pledgee/pledge creditor Irrevocable beneficiary Other

If "Other", please specify

Print full name

Date

d	d	m	m	y	y	y	y
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RESET

A WEALTH *of* DIFFERENCE

www.utmostinternational.com

Utmost PanEurope dac (registered number 311420) is regulated by the Central Bank of Ireland.
Registered Office address: Navan Business Park, Athlumney, Navan, Co. Meath C15 CCW8, Ireland.

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

Utmost PanEurope dac is authorised for the pursuit of the life insurance business in France on a freedom to provide services basis and is duly registered for such purposes with the French Prudential Control and Resolution Authority (Autorité de Contrôle Prudenciel et de Résolution or 'ACPR') under the number 228159.

Utmost PanEurope dac is authorised to operate in Italy on a freedom of services basis (FOS) and is duly registered for such purposes with the IVASS in Albo delle Imprese, Elenco II, with number II.00509.

Utmost PanEurope dac is duly registered for the pursuit of the life insurance business in Portugal on a freedom to provide services basis and is duly registered for such purposes with the Portuguese Insurance Supervisory Authority (Autoridade de Supervisão de Seguros e Fundos de Pensões or 'ASF') under the number 4693.

Utmost PanEurope dac is authorised to operate in Spain on a freedom of services basis (FOS) and is duly registered for such purposes with the Register of Insurance and Reinsurance Undertakings of the Spanish General Directorate of Insurance and Pension Funds (Dirección General de Seguros y Fondos de Pensiones) under the number L0466.

Utmost PanEurope dac is a Category A Insurance Permit holder with the Jersey Financial Services Commission.

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