



# WEALTH INTERACTIVE USER GUIDE

CORPORATE TRUSTEE – APPROVING TRANSACTIONS

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# CONTENTS

This guide covers approving the following transactions:

- 1 New business applications
- 2 Top up applications
- 3 Dealing instructions
- 4 Withdrawals

# CORPORATE TRUSTEE – APPROVING NEW BUSINESS APPLICATIONS



Select 'View approvals' from within transactions to review on the homepage.

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You were last signed in on 24/08/2022 522630USRNM ▼

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Member name or member reference or policy number

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Hello 522630USRNM (522630)

Policy / Member Search

Enter policy reference number or member name

Search

Transactions to review (1)

There is / are 18 outstanding transaction(s) that require approval

View approvals

Indicative value valid as of 23/08/2022


Policy type ▼	Policy reference ▼	Adviser firm ▼	Member name ▼	Policy status ▼	Indicative value



4


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- Change the transaction type filter to the relevant transaction type.
- Select the transaction requiring approval.



You were last signed in on **18/03/2022** 539079USRNM 




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## Approvals

You have **1 transactions** awaiting your approval.

Approval actions

Show:

Submission date ▾	Instruction type ▾	Adviser ▾	Member ▾	Policy ▾	Status ▾
17/03/2022	New business application	594425FRSTNM 594425LSTNM	Pathfinder Retirement Scheme Re Antonio Colella	600041355	Awaiting Level2 approval

Check policy and transaction detail within the summary and press **'Proceed to review the application'**.



### Important information

This application should be read in conjunction with the fund and product literature and terms available from your financial adviser.

### Review new investment application

Exit process

#### Application summary

Premium type:	<b>Lump sum</b>	Amount:	<b>EUR 500,000.00</b>
Product:	<b>European Executive Investment Bond - PRIIPs</b>	Assigned Adviser:	<b>595174FRST_NM 595174LST_NM</b>
Application No:	<b>600041355</b>	Adviser firm:	<b>594425FRSTNM 594425LSTNM</b>

#### Application status

Lead policyholder:	Approval status
Ms Christine Micallef (539079)	Not yet approved
Mr John Gray (571073)	Not yet approved
Mr Marc Edge (588315)	Not yet approved

Proceed to review this application

#### Important Information

This application summary should be read together with the European Executive Investment Bond - PRIIPs Policy Terms, European Executive Investment Bond - PRIIPs Client brochure, Illustration, Where to find information about units and funds links to your Utmost PanEurope dac policy and, the relevant Tax and other important information document. In addition, for Belgian Residents only; The Charging Structure sheet confirming the charging structure agreed, the fund information for each of the chosen investments and a Life insurance financial Information sheet. This information is available from your Financial Adviser. Click here to access the **Policy Terms** for your application.

You must click 'Proceed to review this application'. This allows you to review the content of your application. If you have comments or questions about the information contained in the application you can note them on the screens as you review them.

At the end of the review process you can either;

- **Submit changes to your adviser** - Which will return the application to your adviser together with the comments and questions you have raised so they can address them, or,
- Approve and submit the application to Utmost PanEurope dac so it can be processed.

Please note the policy will be subject to the law of habitual residence unless we have agreed otherwise in writing or by endorsement, and that Policy Terms and all other contractual and non-contractual documentation will be in the English language only.

- Review the application details to ensure they are correct.
- Should you need to refer the application back to the adviser enter your comments in the box on the right of the screen.
- When you are ready press '**Next**' to continue.

	Application information		Premiums & assets		Application options		Source of funds & identification		Supporting documents
--	-------------------------	--	-------------------	--	---------------------	--	----------------------------------	--	----------------------

### Uploaded documents

The documents listed below were uploaded by your Adviser to support this application.

Print application summary

#### Uploaded documents

---

TRIREME-QROPS-APPLICATION-ANTONIO\_COLELLA.pdf ?

#### Member

---

Mr name Lstnm - Member

---

Passport\_AC\_&\_NIE\_Certified.pdf  
Latest\_POA.pdf

#### Additional Information

---

Has all the documentary evidence been obtained directly from the customer?      **Yes**

#### Illustration

---

Product Key Information Document(KID)\* ?

\*\*You are viewing the most recent version of the Key Information Document. If you require a previous version, please contact this office.

\*\*\*You are viewing the most recent version of the Asset Key Information Document that we have access to. If you require a previous version of this document, please contact the Asset Manager directly.

#### Refer comments to your Adviser

You can make comments about this page to send to your Adviser at the end of this application.

Back
Next



- Once reviewed, confirm the declarations using tick boxes on screen and press **'Submit application to Utmost International'**.
- If there are further approvers required prior to full submission they will be prompted to log in and review the application as well.
- If all required approvers have approved the application, confirmation of submission will be shown on screen and you can view the policy from your homepage or your 'My policies' page.

Please open and read the attached document **Declaration for the European Executive Investment Bond - PRIIPs**  
 The declarations are divided into three parts:  
 Part A - General declarations which apply to the applicant and, where permitted and appropriate, applicants;  
 Part B - Declarations applicable to applicants where there is more than one applicant and/or where a Fund Adviser has been selected; and  
 Part C - Confirmation and acceptance of the application by each applicant.  
 Before approving and submitting this application you must read the declarations carefully. All applicants must read Parts A and C.  
 Part B must be read where there is more than one person applying for the Policy or where a Fund Adviser is being appointed as part of the application.  
 You must be satisfied that you are able to effect the proposed contract under any taxation, exchange control or insurance law to which you may be subject.  
 Any omission or mis-statement of a material fact in this application could affect the payment of benefits under the European Executive Investment Bond - PRIIPs. A material fact is one which is likely to influence the assessment and acceptance of the application. If you are uncertain whether a fact is material, you should give the full details so that Utmost PanEurope can assess its possible significance. If you become aware of such a fact while Utmost PanEurope is considering your application, you should notify Utmost PanEurope immediately.  
 I confirm that I have received a copy of the following items:  
 - Policy Terms  
 - Client brochure  
 - Illustration  
 - Where to find information about units and funds links to your Utmost PanEurope policy  
 - The relevant Tax and other important information document  
 - At a glance document And if I am applying for a policy while resident in Belgium • Life insurance financial information sheet for Belgium • The Charging Structure sheet confirming the charging structure I/We have agreed for my/our policy • The fund information for each of my chosen investments, from my Financial Adviser.  
 I have had the opportunity of reading them and they have been explained to my satisfaction before approving this application. I understand that further copies of these items are available from my financial adviser, Utmost PanEurope or for generic documents please refer to our website [utmostinternational.com/](http://utmostinternational.com/)

☒ I confirm that I have consulted my Financial adviser before making a final decision and I am happy to proceed with this application. ☒

☒ I confirm that I have read the declarations for the European Executive Investment Bond - PRIIPs and that all the statements made in this application, which are shown in this application and any related documents are true and complete.  
 I confirm :  
 (a) that my assigned adviser has explained the values/key benefits/information of this policy to my satisfaction; and  
 (b) that I have read through all the pages of the policy terms and understand the benefits and risks of the Policy I am buying. ☒

☒ I confirm I have received, read and understood the latest **Key Information Document (KID)** for the Policy and, where appropriate, Key Information Documents (KIDs) and Key Investor Information Documents (KIIDs) for all assets selected, in a language that I understand. Furthermore, I agree that where I choose to change assets of the portfolio fund in future, I will ensure that I receive and understand the asset Key Information Documents for those assets before they are purchased. ☒

[Go back to review application](#)

[Submit application to Utmost International](#)

#### Sending an application back to your Adviser

- You have reviewed your application and made the comments shown on this page.
- You can edit the comments you have made at any point before you click 'Refer application to my adviser'.
- You can click on 'Refer application to my adviser' which will return the application to your adviser in line together with the comments you have made.
- Once your adviser has answered your comments and queries they can resubmit the application to you for approval.

#### Would you like to suggest changes for this application?

If you would like to make comments about this investment application you can suggest changes to your Adviser

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# CORPORATE TRUSTEE - APPROVING TOP- UP APPLICATIONS

Select 'View approvals' from within transactions to review on the homepage.

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Hello 522630USRNM (522630)

Policy / Member Search

Enter policy reference number or member name

Search

Transactions to review (1)

There is / are 18 outstanding transaction(s) that require approval

View approvals

Indicative value valid as of 23/08/2022

Policy type ▼	Policy reference ▼	Adviser firm ▼	Member name ▼	Policy status ▼	Indicative value

- Change the transaction type filter to the relevant transaction type.
- Select the transaction requiring approval.

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You were last signed in on 22/08/2022 537679USRNM ▼

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You are here: Home > Approvals

Approvals

You have 1 transactions awaiting your approval.

Approval actions

Show: 10 transactions ▼

Top up application ▼

Awaiting any approval ▼

Submission date ▼	Instruction type ▼	Adviser ▼	Member ▼	Policy ▼	Status ▼
30/06/2022	Top up application	516035FRSTNM 516035LSTNM	600040483-2FRSTNM 600040483-2SURNM	600040483	Awaiting Level2 approval

Check the policy and transaction details within the summary and press '**Proceed to review the application**'.



Review application  
[Exit process](#)

An application has been submitted  
Please review this application

#### Application summary

Premium type:	Lump sum	Amount:	GBP 100,000.00
Product name:	European Collective Investment Bond - PRI IPs	Assigned Adviser:	S17004PRTYNH
Policy No:	600040483		

#### Application status

Lead policyholder:	Approval status
506811PRFDNM (506811)	Not yet approved

Proceed to review this application

#### What can I do with this application?

You must click 'Proceed to review this application'. This allows you to review the content of your application. If you have comments or questions about the information contained in the application you can note them on the screens as you review them.

At the end of the review process you can either;


- **Submit changes to your adviser** - Which will return the application to your adviser together with the comments and questions you have raised so they can address them, or,
- Approve and submit the application to us so it can be processed.

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- Review the application details to ensure they are correct.
- Should you need to refer the application back to the adviser enter your comments in the box on the right of the screen.
- When you are ready press '**Next**' to continue.

[Review application](#)  
[Exit process](#)




✓ Application information
✓ Premiums & assets
✓ Application options
Source of funds
✓ Supporting documents

Supporting documents (if any)

Additional Information

Has all the documentary evidence been obtained directly from the customer?
**Yes**

Illustration

 [Print application summary](#)

Refer comments to your Adviser

You can make comments about this page to send to your Adviser at the end of this application.

Enter your comment...

Back
Next

- Once reviewed, confirm the declarations using the tick boxes on screen and press '**Submit application to Utmost International**'.
- If there are further approvers required prior to full submission they will be prompted to log in and review the application as well.
- If all required approvers have approved the application, confirmation of submission will be shown on screen and you can view the policy from your homepage or your 'My policies' page.

11. I am a national/citizen of the country (or countries in the case of dual nationality/citizenship) detailed in this application and am not a national or citizen of any other country.

12. The premium detailed in this application and any other premium tendered in respect of this application are derived solely from the source of funding provided and have, where required, been declared to the relevant tax authority in my country of residence for taxation.

13. The application for an Utmost PanEurope policy is not being made for the purpose of concealing funds, assets or wealth with a view to the evasion of any taxes I am obliged to pay.

☒ I accept these terms. ☒

☒ I confirm that I have read and understand these declarations. ☒

☒ I confirm that all the information in this application is correct. ☒

[Go back to review application](#) [Submit application to Utmost International](#)

### Application approval

- You have successfully approved this application and it will be sent to Utmost International for approval. If there is more than one applicant for this application, then all will need to approve before it is sent to Utmost International.
- Once the application is accepted, we will request settlement of funds from the card details you have provided.
- Until the application is approved you will not be able to access the policy details but you can follow the progress on your Online Service Account.

You may now view the policy from your homepage or your 'My Policies' page.

[Return to my homepage](#) [View my policies page](#)



# CORPORATE TRUSTEE – APPROVING DEALING INSTRUCTIONS



Select 'View approvals' from within transactions to review on the homepage.



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Member name or member reference or policy number

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Hello 522630USRNM (522630)

Policy / Member Search

Enter policy reference number or member name

Search

Transactions to review (1)

There is / are 18 outstanding transaction(s) that require approval

View approvals

Indicative value valid as of **23/08/2022**

Policy type ▼	Policy reference ▼	Adviser firm ▼	Member name ▼	Policy status ▼	Indicative value

You are here: [Home](#) > [Approvals](#)

## Approvals

You have **1 transactions** awaiting your approval.


### Approval actions

Show:	10 transactions	Dealing Instruction	Awaiting any approval		
Submission date	Instruction type	Adviser	Member	Policy	Status
22/08/2022	Dealing Instruction	559070FRSTNM 559070LSTNM	600040773-2FRSTNM 600040773-2SURNM	600040773	Awaiting Level1 approval

## Review deal instruction

You must review and approve this deal instruction before it is submitted.

[Back](#)

 [Print application summary](#)

Client name: **538030PRFDNM (538030)**

Policy: **European Executive Investment Bond - PRIIPs (600040773)**

Instruction number: **1294996**

Status: **Awaiting Level1 approval**

### Application information

Deal instruction: **1294996**

Assigned Adviser: **588112PRFDNM**

Policy number: **600040773**

Adviser firm: **559070PRFDNM**

### Deal instruction details

#### Sell details

[Refer/reject this to the submitter](#)

You have selected to sell: **25.0%** of the total holdings of ISHARES V PLC MSCI WORLD GBP HEDGED UCITS which equates to approximately **246.000000** units and **GBP 18,964.14**

Indicative sell total: **GBP 18,964.14**

▶ Assets being sold

#### Buy details

[Refer/reject this to the submitter](#)

You have selected to buy: **APPLE INC 2.3%** SNR 11/05/2022 USD2000 using **100.0%** which equates to approximately **2 4,000.000000** units and **USD 25,011.07**

Indicative buy total: **GBP 18,964.14**

▶ Assets being bought

Comments from your Adviser

### What can I do with this instruction?

#### View details before making a decision

- You can review the deal instruction details and make sure you are happy with it. Once you have reviewed it you can either submit it to us for completion, refer it back if the application was submitted by your Financial adviser/Financial adviser representative or reject the application if the submitter was not your Financial adviser/Financial adviser representative. If you are referring it back to your Financial adviser/Financial adviser representative you have the opportunity to add comments to the instruction so that they understand why you do not want to proceed. **Please note that comments are only sent back when an application is submitted by a Financial adviser/Financial adviser representative.**
- If you are happy with the deal instruction that has been created then you can approve it and it will be submitted to us for completion.


[Continue](#)

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## Submit deal instruction to Utmost International

By submitting this application you confirm that everything within this application is accurate and all terms and conditions have been accepted.

 [Print application summary](#)

### Acknowledgement

By selecting the submit button I confirm I have read the declarations below and that the information provided in this instruction is correct:-

#### Declaration

**Please note: The instruction will not be submitted to Utmost PanEurope dac until all policyholder(s) have accepted and confirmed this instruction. All references to Utmost PanEurope mean Utmost PanEurope dac.**

#### I can confirm that:-

1. I am the current Policyholder, Lead Policyholder, Trustee or authorised signatory and I have legal authority to request transactions to buy and sell assets.
  2. I have ensured that I have had the opportunity to read any relevant offering documents for any asset(s) relating to this dealing instruction where I wished to do so.
  3. I have received or had sight of information concerning, and accept the levels of risk associated with this type of asset, including the risk that this investment could result in a loss of a significant proportion, or the entire sum invested. Where necessary, I meet the minimum criteria of a class of investor in a fund(s) of this nature. I have received advice on this investment in a territory in which the adviser is authorised.
  4. I understand that the buying and/or selling of assets will not begin until Utmost PanEurope has received this instruction in accordance with the Policy Terms.
  5. I understand that where I submit this instruction, the instruction will only be submitted to Utmost PanEurope once it has approved by all the policyholders, if applicable.
  6. I will indemnify Utmost PanEurope from any losses arising from changing the assets if the request is made without sufficient lawful authority.
  7. I understand that an Asset Dealing Charge/Investment Dealing Charge may apply, in accordance with the Policy Terms.
  8. I understand that the provider of the Asset may require the number of units or shares to be purchased or sold rather than a cash value. Where I instruct to buy or sell such an Asset using a cash value, I understand that the previous day's closing price will be used to convert the cash value into the number of units or shares to buy or sell the Asset.
- I also understand that market movements may result in a different cash value being applied to purchase or sell the Asset than the cash value I have submitted. By requesting the number of units or shares to be purchased for these Assets, this difference in cash value can be avoided.
- I understand that Utmost PanEurope dac will use my personal data in accordance with the Privacy Policy.

[Go back to review instruction](#)

[Submit to Utmost International](#)

### Approving the deal instruction

#### View details before making a decision

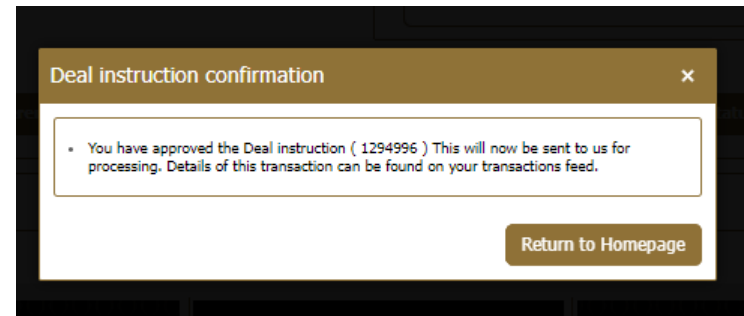
- Review the deal instruction details and make sure you're happy with it.
- Once reviewed you can either submit it to us for completion, refer it back if the application was submitted by your Financial adviser/Financial adviser representative, or reject the application if the submitter was not your Financial adviser/Financial adviser representative.
- If you are referring it back to your Financial adviser, you can add comments to the instruction to explain why you do not want to proceed. Once you are satisfied with the deal instruction you can approve it and it will be submitted to us for completion.

#### Please note

- Comments are only sent back when an application is submitted by a Financial adviser/Financial adviser representative.
- For policies held via a QROP/QNUP or SIPP company, your instruction may require their approval through Wealth Interactive before any trades can be placed. Once you've submitted to Utmost International, your instruction will be sent to the Corporate Trust if required.

### Would you like to suggest changes for this deal?

If you would like to make comments about this deal instruction you can Refer/reject application to the submitter.



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# CORPORATE TRUSTEE - APPROVING WITHDRAWALS

Select **'View approvals'**  
from within transactions to  
review on the homepage.



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Member name or member reference or policy number

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Hello 522630USRNM (522630)

Policy / Member Search

Enter policy reference number or member name

Search

Transactions to review (1)

There is / are 18 outstanding transaction(s) that  
require approval

View approvals

Indicative value valid as of **23/08/2022**

Policy type ▼	Policy reference ▼	Adviser firm ▼	Member name ▼	Policy status ▼	Indicative value

- Change the transaction type filter to relevant transaction type.
- Select the transaction requiring approval.

The screenshot shows the utmost WEALTH SOLUTIONS web application. At the top right, it indicates the user was last signed in on 24/08/2022 with user ID 527988USRNM and provides a Sign off button. Below this is a search bar for member names, references, or policy numbers. A navigation menu includes links for Home, My Policies, Members, Approvals (which is highlighted), Pipeline, Admin, Alerts, and Help & support. The breadcrumb trail shows 'You are here: Home > Approvals'. The main heading is 'Approvals' with a sub-message: 'You have 2 transactions awaiting your approval.' Below this is an 'Approval actions' button. A table displays the transactions with filters for 'Show: 10 transactions', 'One off withdrawal', and 'Awaiting any approval'. The table has columns for Submission date, Instruction type, Adviser, Member, Policy, and Status.

Submission date ▾	Instruction type ▾	Adviser ▾	Member ▾	Policy ▾	Status ▾
12/08/2021	One off withdrawal	250422FRSTNM 250422LSTNM	2501413FRSTNM 2501413SURNM	20849293	Awaiting Level1 approval

Check the policy and transaction detail within the summary and press **'Proceed to review this request'**.



Review one-off withdrawal request  
Exit process

A one-off withdrawal request for your policy has been submitted  
A withdrawal request for your policy has been submitted by your lead policyholder.  
Before this withdrawal can be made you must review and agree to the withdrawal request.

Application summary

Withdrawal type:	One-off withdrawal	Amount:	GBP 1,519.10
Product type:	Executive Investment Bond	Lead policyholder:	504832PRTYNN
Account reference:	20849293	Assigned Adviser:	556388PRTYNN

What can I do with this request?

- You must select 'Proceed to review this request'. This allows you to review the content of this request.
- At the end of the review process you can either:-
  - Approve or reject the withdrawal request.

Application status

Secondary account holders:	Approval status
Matt Le Tissier (527988)	Not yet approved
Fiona Bayne (532796)	Not yet approved
Mr Stephen Hare (533184)	Not yet approved
Teal Gill (534845)	Approved
Chloe Aston (546502)	Not yet approved
Miss Jane Grassie (555781)	Not yet approved
Mrs Hollie Shaw (569621)	Not yet approved
Mrs Nicky Jehan (575375)	Not yet approved
Ms Fiona Bayne L2 (577900)	Not yet approved
Mr Ashley Baglietto L1 (579161)	Not yet approved

Proceed to review this request

- Review the instruction and confirm declaration using the tick boxes on screen.
- Press '**Approve**' and if you are the final approver the transaction will be submitted to Utmost International.
- If there is further approvers required they will need to review the instruction prior to submission.

Declaration

I,

1. authorise and request Utmost International Isle of Man Limited to carry out the transaction detailed in this request in accordance with Utmost International's relevant policy Terms and Conditions.
2. confirm that there is no assignment, or any person or company with a notice or interest in the policy.
3. confirm that there is no Bankruptcy Order against me or any beneficiary (if applicable), nor am I, or the beneficiary, an undischarged bankrupt, or deemed to be insolvent under any relevant insolvency legislation.
4. undertake to indemnify Utmost International Isle of Man Limited against any claims or demands made by any other person or party as a result of this payment request.
5. agree that payment constitutes full discharge of the liability of Utmost International Isle of Man Limited.
6. understand that the value of Allocated Units cancelled to pay for the one-off withdrawal may be greater than the amount of the one-off withdrawal specified in this instruction due to any charges deducted in respect of the one-off withdrawal (such as an Asset Dealing Charge/Investment Charge).
7. confirm that all the information contained in this application is true and correct, and that I am entitled to the legal and/or beneficial interest in the policy unless the policy is subject to a trust or nomination and the beneficiaries are entitled to receive payment in accordance with the provisions.
8. confirm that I have sought financial advice in regards to the potential tax consequences of making this one-off withdrawal from my policy and have referred to the policy terms and literature in respect of this one-off withdrawal.
9. confirm that I am aware of the potential tax consequences of receiving the one-off withdrawal, and I will Declare these proceeds, if applicable, to the relevant tax authority in my country of residence.

Utmost International Isle of Man Limited does not offer legal, tax or financial advice and we can accept no responsibility for any action taken, or refrained from being taken, 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.

☒ I confirm that I have consulted my financial adviser/financial adviser representative before making a final decision to proceed with this request and I am happy to proceed.
 ☒

Reject

Approve

You have approved a one-off withdrawal request

Investment account: **Executive Investment Bond(20849293)**

This transaction will commence once all other policyholders have approved this request.

OK

# IMPORTANT INFORMATION

[www.utmostinternational.com](http://www.utmostinternational.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.

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Registered Office address: Navan Business Park, Athlumney, Navan, Co. Meath, C15 CCW8, Ireland.

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