

PROFESSIONAL PORTFOLIO

DISCHARGE AND REQUEST FOR PAYMENT FORM

Please Complete All Sections

Plan Number: _____

Planholder(s): _____

Life Assured: _____

Claimant(s): _____

Sum Assured: _____ Benefit Payable: _____

Declaration

I/We the undersigned: _____

of: _____

☐ as Planholder(s) ☐ as Trustees of the trust holding the above numbered plan

☐ as Assignee(s) ☐ as Administrator(s)/ Executor(s) of the estate of the above-named planholder

I/We hereby acknowledge that the said benefit payable is the total amount due to me/us in respect of the above-mentioned plan and that payment to me/us or to my/our order will be in full discharge of all liability under the said plan which has been delivered up to be cancelled accordingly. I/We request that the said amount be:

Please indicate as appropriate

☐ paid by bank transfer (less bank charges) ☐ transfer proceeds to Portfolio Bond number _____

Payment Details – please complete as applicable

Please note that IBAN and BIC codes are required for all European payments.

Payment will be made by electronic transfer (all charges for electronic transfer will be accounted to the payee).

Currency: _____

Name of Bank: _____

Address: _____

Sort Code: _____ Swift Code/ BIC: _____

Account Name: _____ Account No: _____

IBAN: _____ ABA: _____

If more than one payee, please submit an additional signed form(s).

Signature of First Claimant:

Signature of Second Claimant:

Witness to the Signature and Identify of _____ Claimant(s)

Witness: _____

Witness: _____

Address: _____

Address: _____

Occupation: _____

Occupation: _____

Signature of First Witness:

Signature of Second Witness:

Date:

d	d	m	m	y	y	y	y
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Date:

d	d	m	m	y	y	y	y
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Please return with the original plan documents if not already sent.

A WEALTH *of* DIFFERENCE

Utmost Worldwide Limited, Singapore Branch: 6 Battery Road #16-02, Singapore 049909.

Registered in Singapore as a Branch of a Foreign Company - Number T10FC0110K. Licensed by the Monetary Authority of Singapore as a direct insurer to carry on life business in Singapore.

Utmost Wealth Solutions is the trading name used by Utmost Worldwide Limited, Singapore Branch 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 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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