

Change of Discretionary Investment Strategy Form

Policy number: _____

Policyholder: _____

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
		100%

Portfolio Manager

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

Investment Strategy	Portfolio Manager	Portfolio management charge	Performance charge	Exit charges	Investment strategy to be used to pay the charges

(Continued overleaf)

Change of Discretionary Investment Strategy Form (continued)

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

In case of multiple investment strategies please indicate the investment strategy from which the Policy charges will be collected, where applicable:

Data protection

Utmost PanEurope dac recognises that protecting your personal information, including special categories of data (sometimes referred to as sensitive personal data) is very important to you and that you have an interest in how we collect, use, store and share such information.

To provide our services, Utmost PanEurope dac needs to collect and use information about individuals such as their name, address and date of birth as well as other necessary information. The purposes for which we use personal data may include arranging insurance cover, handling claims and crime prevention. More information about our use of personal data is provided in the Utmost PanEurope dac Privacy Notice at utmostinternational.com/privacy-statements/

Hard copies are available on request by emailing or writing to:

Data Protection Officer, Utmost PanEurope dac, Ashford House, 18 -23 Tara Street, Dublin 2, D02 VX67 or dataprotection@utmost.ie

Providing the services may involve the disclosure of personal data to third parties such as insurers, reinsurers, loss adjusters, premium finance providers, sub-contractors, our affiliates and certain regulatory bodies who may require your information themselves for the purposes described in the Utmost PanEurope dac Privacy Notice.

Depending on the circumstances, the use of personal data described in this notice may involve a transfer of data to countries outside the European Economic Area that have less robust data protection laws. Any such transfer will be done with appropriate safeguards in place.

In some special circumstances, we (and other insurance market participants) may need to collect and use special categories of personal data (e.g. health information) and/ or information relating to criminal convictions and offences. Unless another legal ground applies, your consent to this processing may be necessary for us to provide you with the relevant services. Where your consent is relied upon to process data, you have the right to withdraw consent at any time but, if it is withdrawn, we may be unable to continue to provide our services and this may mean that we are unable to process an enquiry, claim and we may cease to provide the applicable insurance cover.

(Continued overleaf)

Change of Discretionary Investment Strategy Form (continued)

Declaration

My signature below is confirmation that:

- I direct Utmost PanEurope to change the Discretionary Investment Strategy applied to my Policy as described in this form.
- I 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 Strategies offered.
- I acknowledge that the allocation between the different Discretionary Investment Strategies will vary according to performance over time.
- I acknowledge that Utmost PanEurope have discretion to accept this request.
- I acknowledge that if accepted the request above will take affect from the date indicated in the confirmation Utmost PanEurope send me.
- I understand that my request will be processed by Utmost PanEurope on the first available date after receipt of the instructions.
- I understand that market fluctuations and the time taken to process the request may result in a different percentage allocation then indicated in the instructions provided.

Signature of first Policyholder:

Signature of second Policyholder (if any):

Date:

Date:

In certain circumstances the following signatures are required:

- If the Policy has been pledged or transferred in another similar manner that another party's consent is required.

Name: _____

Date:

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