

DECLARATION OF HEALTH FORM

Utmost Wealth Solutions is the brand name used by a number of Utmost companies. This item has been issued by Utmost Limited and Utmost Ireland dac.

IMPORTANT NOTES

Please complete this form (ensuring all sections are fully completed) using **blue or black 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. **Please do not use correction fluid.**

Please ensure that all sections are fully completed. Please note that in this form words in the singular shall include the plural and vice versa.

SIGNATURE This symbol highlights the signature sections within this form which must be signed by the relevant parties.

Please complete this form as fully and accurately as you can. If you have any doubt about whether a fact is relevant then you should disclose it.

Utmost uses the information you give it to provide its products and services. It will be kept securely. How your information is used, your rights, and how you can exercise them, is detailed in Utmost's Privacy Notice/Statement(s).

CHECKLIST

We want to process this form as quickly as possible. To help us do this, please remember to:

- › Attach any additional information, instructions or documentation you are sending securely to the back of the form.
- › Ensure that the form has been signed by the applicants.

Finally, return the completed form to:

For Estate Planning Bond applications and Discounted Gift Trusts: **Utmost Limited, Royalty House, Walpole Avenue, Douglas, Isle of Man, IM1 2SL**

For Generation Planning Bond applications: **Utmost Ireland dac, Ashford House, Tara Street, Dublin 2, D02 VX67.**

A APPLICANT DETAILS

Name of applicant	<input type="text"/>
Date of birth	<input type="text" value="d"/> <input type="text" value="d"/> <input type="text" value="m"/> <input type="text" value="m"/> <input type="text" value="y"/> <input type="text" value="y"/> <input type="text" value="y"/> <input type="text" value="y"/>
Policy number (if known)	<input type="text"/>

I hereby supplement the statements made in my original application as follows:

(Tick the 'yes' or 'no' boxes to show which answers apply to you and give details as requested. **If the answer to any question is 'yes' please give full details in the notes section on page 2.**)

Since the date of the application, have you:	yes	no
1 Consulted your GP, been referred to or received an investigation at a hospital or clinic as an inpatient or outpatient? If 'yes', please give full details including complaint, DATES and treatment or advice given.	<input type="checkbox"/>	<input type="checkbox"/>
2 Started taking any medication prescribed by a doctor? If 'yes', please give the name of the medication, the reason for its prescription and how long you have been taking it.	<input type="checkbox"/>	<input type="checkbox"/>

A WEALTH *of* DIFFERENCE

Utmost Wealth Solutions is the 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 Limited and Utmost Ireland 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 licenced by the Isle of Man Financial Services Authority. Utmost Services Limited (No 059248C) is not regulated. Each of the above companies has its registered office at: Royalty House, Walpole Avenue, Douglas, Isle of Man, IM1 2SL British Isles.

The following companies are registered in Ireland: Utmost Ireland dac, trading as Utmost Wealth Solutions, is regulated by the Central Bank of Ireland. Its registered number is 303257 and it has its registered office at: Ashford House, Tara Street, Dublin 2, D02 VX67, Ireland. Utmost PanEurope dac, trading as Utmost Wealth Solutions, is regulated by the Central Bank of Ireland. Its registration number is 311420 and it has its registered office at: Navan Business Park, Athlumney, Navan, Co. Meath C15 CCW8, Ireland. Its FCA number is 426350. Both companies are authorised by the Financial Conduct Authority in the UK for Conduct of Business Rules.

Since the date of the application, have you:	yes	no
3 Other than as mentioned above, received medical advice or treatment? If 'yes' please give full details including reasons and DATES.	<input type="checkbox"/>	<input type="checkbox"/>
4 Had any signs or symptoms of ill health or disability for which you have not yet sought medical advice? If 'yes' please give full details.	<input type="checkbox"/>	<input type="checkbox"/>

I declare that the information provided by me in this form is true and completed to the best of my knowledge and belief. I confirm that my consent given with my recent application to Utmost Limited/ Utmost Ireland dac to obtain medical information is still applicable.

SIGNATURE **Applicant**

Date

d	d	m	m	y	y	y	y
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SIGNATURE

Once this document is signed and dated, it is only valid for three months from the date of signing.

B NOTES

Question Number	Additional Information