

QROPS/QNUPS/SIPP INVESTMENT ADVISER APPOINTMENT AUTHORISATION



FOR USE WITH THE EXECUTIVE INVESTMENT ACCOUNT ONLY

Please use CAPITAL LETTERS only and use blue or black ink.

This form is to be used by the Trustees to appoint the Pension Member as an Investment Adviser for the account detailed below. It can also be used by the Investment Adviser to appoint a Third Party Investment Adviser for the account detailed below. All references to Utmost International in this form mean Utmost International Isle of Man Limited Singapore Branch. Account means the policy or cluster of policies issued to the account owner(s) following their application for an Executive Investment Account.

THIS DOCUMENT WAS LAST UPDATED IN JANUARY 2024.

Please confirm with your financial adviser that this is the most up-to-date document for your product or servicing needs.

SIPP/QROP/QNUP Scheme

Account Number

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We, the Trustees, confirm that under the provisions of the Trust Deed and our regulatory authority, we are able to appoint the Pension Member as an Investment Adviser in respect of all investment decisions on the Utmost International account referenced above.

A APPOINTMENT OF PENSION MEMBER AS INVESTMENT ADVISER

We, the Trustees, hereby appoint the Pension Member detailed below to be the Investment Adviser with immediate effect. We have delegated all investment decision making to the Investment Adviser. This means the Investment Adviser has complete discretionary authority to make all investment decisions, to buy or sell assets, hold cash or other investments. We are aware this account allows investment into various types of assets and some of these assets are only suitable for Professional Investors. We accept the risk that the Investment Adviser may invest in assets that provide a lesser degree of investor protection; result in the loss of a significant proportion of some or all of the sum(s) invested; have a minimum duration; impose significant redemption penalties; or are illiquid.

Should we not want to hold such assets in the account, we will inform the Investment Adviser. We understand that Utmost International will not restrict the choice of assets available under the account. We authorise Utmost International to act upon the investment instructions of the Investment Adviser.

Pension Member Name

Address

**B APPOINTMENT OF THIRD PARTY INVESTMENT ADVISER FEE
(OPTIONAL AND CANNOT BE THE MEMBER OR TRUSTEE)**

We, the Trustees hereby agree that the Investment Adviser can appoint the Third Party Investment Adviser listed below to discuss any proposed alterations to the investment composition of the Utmost International account referenced above with the Investment Adviser. The Investment Adviser hereby appoints the Third Party Investment Adviser listed below to discuss any proposed alterations to the investment composition of the Utmost International account referenced above. The Investment Adviser and Third Party Investment Adviser understand that this account allows investment into assets which are only suitable for Professional Investors. The Investment Adviser and Third Party Investment Adviser agree that, if the Trustees do not want to invest in such assets, they will not choose them to hold in the account. The Trustee and Investment Adviser agree to pay the Third Party Investment Adviser's Fee at the current rates specified here:

Fee % (Percentage per annum paid quarterly in arrears based on value at end of each previous quarter)

Currency (Currency to be debited from the account)

Name of Third Party Investment Adviser

Bank Name & Address

 Postcode

Account Name

SWIFT/BIC Code

The Trustee and Investment Adviser agree that the fees shall be paid directly to the Third Party Investment Adviser listed above by Utmost International on receipt by Utmost International of this authority, which hereby authorises Utmost International to debit the above referenced Utmost International account with an equivalent amount which will be paid quarterly at each valuation date. Such fees will be treated as partial surrenders from the account.

The Trustee and Investment Adviser also agree that Utmost International is not responsible for any loss or liability to the Account arising from this appointment.

Further, the Trustees and Investment Adviser for themselves and their estate(s) indemnify Utmost International against all claims, demands and actions against Utmost International relating to any such loss suffered. This includes all costs and expenses arising for or in respect of the activities and performance of the Investment Adviser or Third Party Investment Adviser (including, but without limitation, the cost of defending in any court of law any such claim, demand or action against Utmost International).

By signing this instruction the Investment Adviser and Third Party Investment Adviser agree to their respective appointment detailed above and confirm that they hold the relevant authority necessary under the regulations applicable to the Monetary Authority of Singapore (MAS) and that they are complying with, and will continue to comply with, the local laws, regulations and requirements in order to act in the capacity as Investment Adviser and Third Party Investment Adviser respectively. Utmost International does not warrant the Investment Adviser's or the Third Party Investment Adviser's suitability or regulatory credentials.

	Investment Adviser	Third Party Investment Adviser
SIGNATURE	<input type="text"/>	<input type="text"/>
Name	<input type="text"/>	<input type="text"/>
Date	<input type="text"/>	<input type="text"/>

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SIGNATURE

Trustee

Trustee

Name

Date

d	d	m	m	y	y	y	y
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d	d	m	m	y	y	y	y
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This original form must be submitted to Utmost International Isle of Man Limited Singapore Branch.

A WEALTH *of* DIFFERENCE

www.utmostinternational.com

Calls may be monitored and recorded for training purposes and to avoid misunderstandings.

Utmost Wealth Solutions is the registered business name of Utmost International Isle of Man Limited Singapore Branch.
Utmost International Isle of Man Limited Singapore Branch, 6 Battery Road #16-02, Singapore 049909.
Tel: +65 6216 7990 Fax: +65 6216 7999.

Registered in Singapore Number T08FC7158E. Authorised by the Monetary Authority of Singapore to conduct life assurance business in Singapore.
Member of the Life Insurance Association of Singapore. Member of the Singapore Finance Dispute Resolution Scheme.

Utmost International Isle of Man Limited is registered in the Isle of Man under number 024916C. Registered Office:
King Edward Bay House, King Edward Road, Onchan, Isle of Man, IM99 1NU, British Isles. Licensed by the Isle of Man Financial Services Authority.

Utmost Wealth Solutions is registered in the Isle of Man as a business name of Utmost International Isle of Man Limited.

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