

ONLINE ACCESS AUTHORISATION FORM FOR INVESTMENT ADVISERS



To: Agency Team, Utmost International Isle of Man Limited, King Edward Bay House, King Edward Road, Onchan, Isle of Man, IM99 1NU, British Isles.

From:	Firm name		(the "Adviser")
Re:	Individual Investment Adviser Name		(the "Authorised Staff Member")

UTMOST ONLINE ACCESS AUTHORISATION - DEALING

We, the undersigned authorised signatories of the Adviser, authorise Utmost International Isle of Man Limited (Utmost) to act upon instructions sent or purportedly sent using the Utmost Online Trading facility by the Authorised Staff Member set out above. This includes instructions to buy, sell or switch investments to which the policies of the policyholders of Utmost, who have nominated us as their Adviser, are linked.

We confirm that the Authorised Staff Member has received the appropriate permission from the company to place deals through this facility.

We acknowledge that if the status of the above named individual should change we shall advise Utmost immediately.

In accordance with the terms of the completed **Nomination of Investment Adviser** form, **we agree** on behalf of the Adviser that Utmost shall not be responsible to the Adviser or any of the Advisers' clients for any loss on the value of the policies or any other liability in respect of any investment transactions made in accordance with such instructions and notwithstanding that it shall be shown that such instructions were not sent by the Authorised Staff Member.

We confirm that we have read, understood and agree on behalf of the Adviser to the Terms of Use which apply to the use of the Utmost website.

We further confirm that the Adviser has given any necessary advice to, and obtained any appropriate agreement from, the policyholders of the bonds. In particular, the Adviser has explained:

(a) that the Authorised Staff Member may send investment instructions over the Internet to Utmost.

(b) the risks involved which includes the provision in the Terms of Use that Utmost will not be responsible for any loss or liability arising from the use of the Utmost Online Trading facility.

ADVISORY FIRMS

We acknowledge and agree that where the Authorised Staff Member places deals online through the Utmost Online Trading facility on an advisory basis, we will have obtained in advance the policyholder's express written consent to place any deals online. We agree to indemnify Utmost in respect of all losses, claims, damages however arising or incurred as a result of the Adviser using this facility.



The Authorised Staff Member will be given access to trade on any contract on which the Adviser is appointed as Investment Adviser.

A WEALTH *of* DIFFERENCE

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 643 345. 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.

IOM PR 0033 | 11/22

UTMOST INTERNATIONAL ISLE OF MAN LIMITED

ONLINE ACCESS AUTHORISATION FORM FOR INVESTMENT ADVISERS

We, the authorised signatories, **acknowledge and agree** the statements set out above on behalf of the company.

	Authorised Staff Member	Authorised Signatory																	
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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 Statements.