

ONLINE SERVICES REGISTRATION FOR AN ADVISER FIRM

To register for Utmost's online services please complete in BLOCK CAPITALS and return this registration via email to IOMadviserservicing@utmostinternational.com.

All applications must be authorised by a Controlling Person or Authorised Signatory (director/beneficial owner or any person with power to direct the Company and any natural person that holds directly or indirectly more than 25 percent of the shares or voting rights of the Company or a documented Authorised Signatory).

Title (✓)	Mr	Mrs	Miss	Other	<input type="text"/>
Forename(s):	<input type="text"/>			Surname(s):	<input type="text"/>
Date of birth:	<input type="text"/>	<input type="text"/>	<input type="text"/>	Country:	<input type="text"/>
Mobile:	<input type="text"/>			Email:	<input type="text"/>
Adviser Firm Name:	<input type="text"/>				
Adviser Agency Number:	<input type="text"/>				
Are you a Controlling Person or Authorised Signatory within the company?:				Yes ¹	No ²
If no, employee position?:	<input type="text"/>				

Existing user

I am already registered on the Online Service Centre for Utmost Worldwide or Utmost PanEurope, and I would like the same user name for the Utmost International Isle of Man Online Service Centre:

Please provide Existing User Name:

New user

Please provide the following registration details, which will be used to process this registration. Both your User Name and Memorable Name must be between 6 and 20 alphanumeric characters with no spaces, symbols or punctuation marks.

User names will be unique so please consider your selection carefully.

User Name:

In the event that your requested User Name has already been allocated please provide an alternative.

User name alternative:

Memorable name: Please tick which question relates to your choice of Memorable Name:

Prompt:	<input type="checkbox"/> Your place of birth?	<input type="checkbox"/> Your mother's middle name?
	<input type="checkbox"/> Your father's middle name?	<input type="checkbox"/> Your best friend's name?
	<input type="checkbox"/> The name of your pet?	<input type="checkbox"/> The first car you owned?
	<input type="checkbox"/> The name of the first school you attended?	<input type="checkbox"/> Your Memorable number?
	<input type="checkbox"/> The hospital you were born in?	

Memorable name:

Q Please note the administration access for each Online Service Centre is managed by each individual Utmost Company. Please ensure you continue to contact the relevant Utmost Company for your request and additional queries.

DECLARATIONS

- ¹ On behalf of the above Company, I confirm I have the appropriate authority and hereby request that Utmost International grant me [Super-User] access rights to the Service Centre and associated online services ("Utmost Online"), which will enable me to set up and control 'administrator' and 'normal' user access rights, to records relating to the Introducer. I understand that if Terms of Business are not currently held with Utmost International, Adviser access will be granted.
- ² On behalf of the above Company, I request that Utmost International grant access to the Service Centre for this Applicant to access records relating to this Company. I understand that if Terms of Business are not currently held with Utmost International, Adviser access will be granted.

I acknowledge that Utmost International is not responsible for the actions of the Applicant and how they use the information obtained from the Service Centre. It is further acknowledged that we accept full responsibility for any breach of the Terms and Conditions and/or misuse of data by the Applicant and indemnifies and holds Utmost International harmless for any and all direct and/or indirect costs resulting from such breach or misuse. Furthermore I acknowledge that the applicant is responsible for notifying Utmost International immediately in writing should access, including individual adviser or consultant access to Utmost Online be no longer required. Utmost Online access will automatically be deleted after one year of inactivity.

DATA PROTECTION

Utmost Worldwide act as a Data Processor on behalf of Utmost International. To view the privacy statements for each party please visit <https://utmostinternational.com/privacy-statements/>

By signing this form you are providing your confirmation that you have the relevant authority from the data subject to provide the information, including where necessary, sensitive personal data as defined under the Law.

Reference can be made to our website for further information regarding the statutory rights relating to data protection. If you have any questions please contact the Utmost International Data Protection Officer at IOM.DPO@utmostinternational.com.

Q Please note if you are using DocuSign and are based outside of the UK you must ensure your Adviser Firm has completed the **Digital Signature Application Form** in order for it to be accepted.

UTMOST INTERNATIONAL
ONLINE SERVICES REGISTRATION FOR ADVISER / MANAGER

SIGNATURE

APPLICANT SIGNATURE:

Print name

Date

d	d	m	m	y	y	y	y
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**CONTROLLING PERSON OR
AUTHORISED SIGNATORY SIGNATURE:**

d	d	m	m	y	y	y	y
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www.utmostinternational.com

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

Utmost International Hong Kong Office: Unit 2402C, Great Eagle Centre, 23 Harbour Road, Wanchai, Hong Kong.
Tel: +852 3552 5888 Fax: +852 3552 5889. Authorised by the Insurance Authority of Hong Kong to carry on long-term business.

Utmost Wealth Solutions is a 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. Tel: +44 (0)1624 655 555 Fax: +44 (0)1624 611 715.
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.

Utmost PanEurope dac (registered number 311420) is regulated by the Central Bank of Ireland.

Registered Office address: Navan Business Park, Athlumney, Navan, Co. Meath, C15 CCW8, Ireland.

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