

# PRIVATE WEALTH PORTFOLIO UK PORTFOLIO MANAGER UNDERTAKING

Please provide the account details from which the Premium will be paid:

Portfolio Manager	<input type="text"/>
Address	<input type="text"/>
	<input type="text"/>
Applicant name and address	<input type="text"/>
	<input type="text"/>
	<input type="text"/>

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## UNDERTAKING

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I undertake that:

- › I will perform a review of the assets received and assess their suitability for the Discretionary Investment Mandate.
- › I will test each asset against the investment strategy and if there are assets divergent to the investment strategy then these will be realised so that the funds can be appropriately invested.
- › I understand that it is my decision to choose to retain assets if they conform to the investment strategy and I am not and will not be influenced by any party in particular the applicant.
- › I will only ask the applicant details that allow me to determine the suitability and adequacy of their Investment strategy and I will not allow the applicant to influence my investment decisions.
- › I understand that the applicant cannot assume that a pre-existing portfolio will be retained in whole or part, for any period of time, or at all.

<b>SIGNATURE</b>	<b>Portfolio Manager</b>	<input type="text"/>
Date	<input type="text"/>	<input type="text"/>

## A WEALTH *of* DIFFERENCE

[www.utmostinternational.com](http://www.utmostinternational.com)

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

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Utmost Wealth Solutions is registered in Ireland as a business name of Utmost PanEurope dac.  
UPE\_WS | 04007 | 07/22

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