# CHANGE OF FINANCIAL ADVISER



### USING THE EDITABLE FIELDS?

To ensure your information is saved correctly, we recommend you save the form to your desktop before you start completing the required fields.

Please use block capitals and black or blue ink only, and complete all sections. Please do not use correction fluid; any amendments should be crossed out and initialled. All references to Utmost International means Utmost International Isle of Man Limited, Utmost International Isle of Man Limited Singapore Branch or Utmost PanEurope dac.

#### To be completed by all policyholder(s).

## Note: Should you wish to change or appoint a fund adviser or Discretionary Asset Manager (advisory or discretionary basis). Separate forms are applicable and you should contact Utmost International.

After completing the form, please send it to Utmost International Isle of Man Limited or Utmost PanEurope dec at the address shown overleaf or scan and e-mail this form to IOMservicing@utmostinternational.com

### CHANGE OF FINANCIAL ADVISER DETAILS

To: Utmost International																		
Policy/Bond/Plan number																		
I/We wish to remove the following should no longer be provided to			er. C	orre	spoi	ndei	nce	or ir	nforr	mati	on i	n re	spe	ct of	my	/our	poli	cies
Name of financial adviser firm																		

### Please note adviser appointments are at the discretion of Utmost International

I/We wish to appoint the following as my/our financial adviser. You may provide by electronic or other means, information or copy documentation to this financial adviser upon the request of this financial adviser. Please note for Utmost PanEurope dac policies, your appointed adviser must be regulated in the territory where mediation takes place. We must hold Terms of Business before an adviser can be appointed. If Terms of Business are not held, your request may be delayed whilst we put these in place or may be rejected in the event terms cannot be agreed.

Name of financial adviser firm	
Name of financial adviser	
Utmost International Advisor ID	
Address of financial adviser	
	Postcode

	Signature 1		Signature 2	
SIGNATURE				
Full name				
Capacity (🗸)	Policyholder	Trustee	Policyholder	Trustee
	Other		Other	
Date	d d m m y y y y		d d m m y y y y	
	Signature 3		Signature 4	
SIGNATURE	Signature 3		Signature 4	
SIGNATURE Full name	Signature 3		Signature 4	
	Signature 3	Trustee	Signature 4	Trustee
Full name		Trustee		Trustee

### 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 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 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 is regulated by the Central Bank of Ireland. Registered No 311420.

Administration Centre for correspondence: King Edward Bay House, King Edward Road, Onchan, Isle of Man, IM99 1NU, British Isles. Tel: +353(0)1 479 3900 Fax: +353 (0)1475 1020.

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. UWSQ PR 05271 | 01/24