

UNIT LINKED- ALTERATION OF PLAN INVESTMENT(S)¹

Instruction to make changes to the existing plan investments attached to a Plan, or to redirect future contribution payments across one or more existing or new plan investments. Alternatively, instruct via our Online Service Centre - see "DID YOU KNOW?" below.

A PLANHOLDER DETAILS

Plan Number:	<input type="text"/>
First Planholder:	<input type="text"/>
Country of Residence:	<input type="text"/>
Second Planholder:	<input type="text"/>
Country of Residence:	<input type="text"/>

Please use this form to instruct Utmost Worldwide in the changes that you wish to make to your plan investments by providing the relevant instruction and authorisation below:

B INVESTMENT DETAILS

Option 1 - Utmost Worldwide Investment Service (For **FOCUS** Planholders only):

FOCUS offers an Utmost Worldwide Investment Service. The fee for this service is 0.5% per annum of your plan units. The fee is deducted monthly while your Plan avails of this service.

Select this box if: A) you wish to switch into this service; OR

B) you already use this service but wish to change your selected investment strategy.

Please confirm the investment strategy and currency into which you would like to switch your investments and redirect any future contributions; OR select the last option if you wish to exit your current strategy and leave the service (tick one option only):

- | | | |
|---|---|--|
| <input type="checkbox"/> Euro Balanced Strategy | <input type="checkbox"/> Pound Sterling Balanced Strategy | <input type="checkbox"/> US Dollar Balanced Strategy |
| <input type="checkbox"/> Euro Cautious Strategy | <input type="checkbox"/> Pound Sterling Cautious Strategy | <input type="checkbox"/> US Dollar Cautious Strategy |
| <input type="checkbox"/> Euro Dynamic Strategy | <input type="checkbox"/> Pound Sterling Dynamic Strategy | <input type="checkbox"/> US Dollar Dynamic Strategy |

I am already invested in a strategy but I wish to leave the Utmost Worldwide Investment Service and exit the strategy.

If you have selected the final option, then please indicate one of the following actions:

- I wish to retain my current plan investments unchanged and continue with the same allocation instruction for future contributions.
- I wish to switch to new plan investments and/or redirect any future contributions and will provide my direction under Option 2.

¹ In relation to the term "plan investment" used in this document, in certain territories the terms "ILP sub-fund", "investment option" or "fund" are used. All have the same meaning.

A WEALTH *of* DIFFERENCE

www.utmostinternational.com

Utmost Worldwide Limited (No. 27151) also trading as Utmost Wealth Solutions, is incorporated in Guernsey. It is authorised and regulated by the Guernsey Financial Services Commission to conduct long term business and general business. Registered Office: Utmost House, Le Truchot, St. Peter Port, Guernsey, GY1 1GR.

Utmost Worldwide Limited also holds a permit issued by the Jersey Financial Services Commission to conduct long term business in Jersey.

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Option 2 - Select your own plan investments:

Plan Number:

Switch instruction to change existing plan investments						Redirection of contributions (future allocation)		
Existing plan investment(s) to be reduced or deallocated	Plan investment currency (Fund currency)	% ²	New plan investment to be allocated ³	Plan investment currency (Fund currency)	% ⁴	Plan investment(s) that future contributions should be allocated to	Plan investment currency (Fund currency)	% ⁵
Example: ABC Bond Fund (Class A)	USD	100%	Example: XYZ Euro Fund (Class A)	EUR	50%	Example: XYZ Euro Fund (Class A)	EUR	75%
			Example: ABC Sterling Bond Fund (Class B)	GBP	50%	Example: ABC Sterling Bond Fund (Class B)	GBP	25%
Total					100%	Total		100%

² % of plan units of existing plan investment(s) to be reduced or deallocated.
³ For split allocations, please indicate percentage per plan investment.
⁴ % of proceeds by value to be allocated to the new plan investment(s). Combined total must equal 100%.
⁵ % of contribution by value to be allocated to the new plan investment(s). Combined total must equal 100%.

Plan Number:

REGIONAL RESTRICTIONS AND INFORMATION

Please note that plan investments that are not authorised by the Securities and Futures Commission ('SFC') in Hong Kong, the Monetary Authority of Singapore ('MAS') or the Swiss Financial Market Supervisory Authority ('FINMA') are not available for offering to Planholders of our branches in those respective countries. The plan investments which are available for offering in each country are listed in the 'Plan Investment Brochure' for that country.

For Hong Kong planholders only: If you wish to verify your risk appetite prior to selecting new plan investments that may entail a different level of risk when compared to your current choices, please complete a 'Risk Profile Questionnaire', available on the Online Service Centre, requested from HKGeneralEnquiries@utmostworldwide.com or by consulting with your Independent Financial Adviser.



IMPORTANT - PLEASE NOTE

We recommend that you seek professional advice from a regulated investment adviser before making any changes to your plan investments.

Please be aware that you may be choosing plan investments with a higher risk rating than your previously selected plan investments. Further plan investment information, including risk rating levels are available within our Fund Information pages on the Online Service Centre.

You will incur foreign exchange costs and ongoing currency risk if you select plan investments that are denoted in a currency that is different to your Plan Currency.

Please ensure that your instructions are stated clearly and unambiguously. Where an instruction is not clear, the processing of changes to your Plan could be delayed and/or rejected. Utmost Worldwide accepts no liability for direct or indirect losses incurred in such circumstances.

The term "plan investment" is used throughout this form to refer to the underlying investments associated with your Plan, which may also be referred to as "investment options", "ILP sub-funds" or "funds" in your Plan documentation. All have the same meaning.

C AUTHORISATION

I wish to alter the plan investments in my Plan as requested above. I understand that my plan investments will be switched and/or future contributions will be re-directed on receipt of this request in accordance with my Plan Terms and Conditions. Where I have selected Option 2, I confirm that I have read and understood the literature, which describes the investment strategy of the plan investment(s) selected.

SIGNATURE

First Planholder:

Date:

SIGNATURE

Second Planholder (if any):

Date:

Holder of a 'Delegated Investment Management Authority' (if applicable):

Holder of authority name:

SIGNATURE

Date:

DID YOU KNOW?

You can have immediate and secure access to your Plan information through our 'Online Service Centre'. This allows you to view up-to-date valuations of your Plan. You can also submit certain requests through the 'Online Service Centre', including requests for alteration of plan investment(s).

To view a demo and/or register for access please visit www.utmostinternational.com