

# DATA SUBJECT ACCESS REQUEST

This form is for you, or someone you have authorised to represent you, to request a copy of the personal information we hold about you.

## 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.

You have the right to get a copy of information that is held about you. This is known as a 'data subject access request' or 'DSAR' and for the purposes of this you are referred to as the 'data subject'.

Whenever personal data is processed, collected, recorded, stored or disposed of it must be done within the terms of Data Protection Legislation. This sets out your rights regarding your personal information, and how you can access that information from organisations that hold it. The General Data Protection Regulation reinforces the rules that currently exist to protect your personal information.

We will provide you with all the information you need to enable you to exercise any of your individual General Data Protection Regulation rights as a data subject.

## A WHAT ARE YOUR RIGHTS?

The General Data Protection Regulation gives you the right to obtain the following.

- › Confirmation that Utmost International (UI) is holding your data;
- › Details of how UI uses your data, including:
  - how and why UI processes your personal data;
  - details of any third parties that UI shares your data with and why your data is shared;
  - details of the categories of data UI holds including personal and/or Special Category/Sensitive data details of how long we will hold your data for and how we will dispose of it after that time under our Data Retention Policy.
- › Access to your personal data and other supplementary information.

## B IT ALSO GIVES YOU THE FOLLOWING RIGHTS:

- › To request that UI deletes any of your personal data that we hold, subject to conditions.
- › To request that UI rectifies any errors in the personal data that we hold about you.
- › To raise a complaint about how we have handled your personal data, you can contact our Data Protection Officer who will investigate the matter at the address below:

**For Utmost PanEurope dac:** The Ireland Data Protection Commissioner, Canal House, Station Road, Portarlington, R32 AP23 Co. Laois, Ireland.

**For Utmost International Isle of Man Limited or Utmost International Trustee Solutions Limited:** The Isle of Man Information Commissioner, First Floor, Prospect Hill, Douglas, Isle of Man, British Isles, IM1 1ET.

**Old Mutual International (Guernsey) Limited,** The Data Protection Manager; Albert House, South Esplanade, St Peter Port, Guernsey, GY1 1AW.

If you are not satisfied with our response or believe we are not processing your personal data in accordance with the law you can make a complaint to the appropriate regulator in respect of data protection:

**Isle of Man** – IOM Information Commissioner: [www.inforights.im/](http://www.inforights.im/)

**Ireland** – Data Protection Commissioner – Ireland: [www.dataprotection.ie/docs/Home/4.htm](http://www.dataprotection.ie/docs/Home/4.htm)

**Guernsey** – Office of the Data Protection Authority: <https://odpa.gg/>

**C MAKING A DATA SUBJECT ACCESS REQUEST**

To make your Data Subject Access Request, please complete this form, giving us the information we need to fulfil your request.

**Important information about completing this form:**

If you are not the person whose data is being requested (the 'data subject') and you are completing this form as their representative, please provide the data subject's name, address and date of birth, together with your own details on the next pages.

Please note that we will need to validate your authority to represent the data subject and make this request before we can send any information to you.

Providing specific information about the data you require will help us process your request faster.

Please indicate how you would like us to contact you

By courier post

By secure email\*

\*If you wish us to use email to correspond and issue data please note that this will be sent using the Utmost International encryption system for securing data. Please complete the email address details on the next page.

**D DATA SUBJECT'S DETAILS**

If a joint policy is held please ensure both policyholders' complete this section

**First policyholder**

Data Subject's name

Data Subject's address

Data Subject's telephone number

Data Subject's date of birth\*

d	d	m	m	y	y	y	y
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Data Subject's previous name

► should this have changed since you last contacted us

Data Subject's previous address

► should this have changed since you last contacted us

Data Subject's email address

► only provide this if you want us to contact you by email

Data Subject's National Insurance number\* (if applicable)

\* Please note that this information will be used to identify you as the data subject

Please complete this if submitting a postal request

I authorise Utmost International to complete a Data Subject Access Request and provide the information requested below:

► Please sign

**Second policyholder (where applicable)**

Data Subject's name

Data Subject's address

Data Subject's telephone number

Data Subject's date of birth\*

d	d	m	m	y	y	y	y
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Data Subject's previous name

▶ should this have changed since you last contacted us

Data Subject's previous name

▶ should this have changed since you last contacted us

Data Subject's email address

▶ only provide this if you want us to contact you by email

Data Subject's National Insurance number\* (if applicable)

*\* Please note that this information will be used to identify you as the data subject*

Please complete this if submitting a postal request

I authorise Utmost International to complete a Data Subject Access Request and provide the information requested below:

▶ Please sign

**Representative Contact Details**

Only provide this information if you are acting on behalf of the data subject

Representative's name

Representative's telephone number

Representative's address

▶ if different from the Data Subject's address

Representative's email address

▶ only provide this if you want us to contact you by email

Please arrange for the Data Subject to complete this. Please include the second Data Subject if the policy is in joint names. If submitting this request by email we will need to contact you separately for the policyholder's signed authority.

I authorise Utmost International to complete a Data Subject Access Request and provide the information requested below:

First Data Subject's authority

▶ Please sign

Second Data Subject's authority (where applicable):

▶ Please sign

**E ABOUT THE DATA YOU ARE REQUESTING**

Please complete the following to indicate what data is required about you/the Data Subject.

Please tick all boxes that are applicable

I would like details of my/the Data Subject's personal data that Utmost International holds in the following categories:

- › Data relating to a specific product held by you/the Data Subject  
For example unit-linked or portfolio bond

► Please specify here

- › Data relating to Utmost International

► Please specify here

- › Data about a specific policy  
Please provide the policy number(s) for which you would like information

► Please specify here

Please tick one or more of the below boxes indicating the specific data you require:

- › Details of our telephone conversations with you/the Data Subject  
Please provide any known telephone numbers we may have been in contact on

► Please specify here

- › If known, please select the date range for the calls

From

To

- › Details of our written correspondence with you  
If known, please provide the date range for the correspondence

From

To

- › Any additional information that you think will help UI to provide all the data that you are seeking

Once the form has been completed it can be submitted by emailing it to **IOM.dsar@utmostinternational.com** or posting it to:

UI Data Guardian  
Utmost International  
King Edward Bay House  
King Edward Road  
Onchan  
Isle of Man  
IM99 1NU.

To protect the privacy of your information, we may need to contact you to validate your identity before we make any information available.

**Important Note if you wish to submit your Data Subject Access by email:**

The Data Subject Access Request form contains your personal identifiable data. In order to protect your data, it should only be sent to us via secure or encrypted email.

**Important note: The product(s) named in this document and to which this document relates is accurate as at December 2021 and is subject to change.**  
**To ensure applicability with respect to a product and, if applicable, a related policy, before taking any action, please liaise with your adviser and/or contact us directly.**

## A WEALTH *of* DIFFERENCE

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 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.

Old Mutual International (Guernsey) Limited, registered office: Albert House, South Esplanade, St Peter Port, Guernsey, GY1 1AW (reg. no. 2424) and is licensed to write long term insurance business under the Insurance Business (Bailiwick of Guernsey) Law 2002 by the Guernsey Financial Services Commission.

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