

Withdrawal Request

This form is used to set up, amend, cancel or postpone a regular withdrawal payment from your policy.

Important notes

1. Payment

Payment will be made in the currency of your bond. If payment is requested in a different currency, we aim to use the exchange rate applicable on the date payment is made. On occasion we may need to use the previous day's exchange rate. Please note that payment cannot be made to a third party.

RL360 Life Insurance Company Limited (RL360° Services) can only make payments to the investor, or to a bank account in the name of the investor. Instructions will be accepted from individuals who hold a power of attorney. However, payments will only be made to the policy owner(s). In the case of an investment by trustees, RL360° Services can only make payments to all the trustees by name, or to a bank account in the name of all the trustees, unless prior arrangements have been made.

A sufficient number of units will be cancelled proportionally across your investment funds and policies to meet each payment.

2. Trusts

If the bond is subject to a trust, this form must be completed and signed by all the trustees. If any changes have occurred relating to the trustees of the trust, certified copies of any deeds of appointment, retirement etc should accompany this request if they have not already been previously supplied. Please note that verification of identity and address will be required for all new trustees.

3. Setting up, cancelling and postponing withdrawals

If you set up a new regular withdrawal from an Offshore With-Profits Fund (OWP) or Guaranteed Growth Fund (GGF) a market value adjuster (MVA) may apply. If you cancel regular withdrawals from an OWP and later recommence them, an MVA may apply to the renewed withdrawals. If you postpone an MVA-free regular withdrawal from an OWP it can be recommenced at a later date without an MVA being applied, provided the amount of the withdrawal hasn't increased. Please see the policy conditions for further information on MVAs.

4. Payment method

Direct credits will usually be credited as cleared funds in your bank account on the fourth working day following the date of the withdrawal. Direct credit transfers are free and can be made in sterling to UK bank accounts, but there may be restrictions on payments made to other geographical areas. **Telegraphic transfer** payments will be made for all withdrawals paid to a bank account outside the UK where direct credit payments aren't accepted. A bank charge is deducted for each telegraphic transfer payment. This charge is currently GBP20 (USD30 or EUR25). RL360° Services does not accept responsibility for any transfer charges taken by the beneficiary bank.

5. Data protection

Any data you provide to RL360° Services may be shared, if allowed by law, with other companies both inside and outside of the RL360° Group and to persons who act on your behalf. Data and information about you can be transferred outside of the Isle of Man and RL360° Services may be required to provide it to its regulator, its government or anyone else required by law.

RL360° Services will use your data and information to allow for the administration of your policy, prevent crime, prosecute criminals and for market research and statistics. RL360° Services will, at all times, make sure that your data and information is only used in ways that are allowed by law.

The Isle of Man Data Protection Act 2002 allows you, after paying a small fee, to receive a copy of the data and information RL360° Services holds about you. For further information please write to: Data Protection Officer, RL360° Services, RL360 House, Cooil Road, Douglas, Isle of Man, IM2 2SP, British Isles.

If you need any help filling in the regular withdrawal form, please contact our customer support team on **+44 (0)1624 638888**.

Please return the completed form to:

Customer Services, RL360° Services, RL360 House, Cooil Road, Douglas, Isle of Man, IM2 2SP, British Isles.

Policyholder details

Policy number

	Policyholder 1	Policyholder 2 (if applicable)
First name(s)	<input type="text"/>	<input type="text"/>
Last name(s)	<input type="text"/>	<input type="text"/>
Current residential address and postcode (in full)	<input type="text"/> <input type="text"/> <input type="text"/>	<input type="text"/> <input type="text"/> <input type="text"/>
Daytime telephone number	<input type="text"/>	<input type="text"/>
Email address	<input type="text"/>	<input type="text"/>

Trust details (if applicable)

Trust name

Correspondence address and postcode

Daytime telephone

Email address

Company details (if applicable)

Company name

Correspondence address and postcode

Daytime telephone

Email address

Global Intermediary Identification Number (FATCA GIIN)*

I hereby request and authorise RL360° Services to pay a withdrawal(s) from my policy in accordance with the details as set out below.

Withdrawals

Amount of payment

Currency of payment GBP USD EUR

Withdrawal frequency Monthly Quarterly Half-yearly Yearly

Other (please specific number of months)

The date we will start processing your withdrawal request (dd/mm/yyyy)

* FATCA GIIN required for companies and corporate trustees only.

Payment instructions

Payment method TT (£20 charge) **OR** Direct credit

TT can be used for payments of any currency to UK or international bank account. Direct credit payments can only be made if the payment currency is being sent to the mother country, ie GBP to UK/Channel Islands, or Euro to Germany, USD to the USA etc.

Bank name	<input type="text"/>	
Bank address and postcode	<input type="text"/>	
Account name	<input type="text"/>	
Branch Swift Code (international)	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>	OR Bank Sort Code (UK only) <input type="text"/> <input type="text"/> <input type="text"/> - <input type="text"/> <input type="text"/> <input type="text"/> - <input type="text"/> <input type="text"/> <input type="text"/>
Account number or IBAN for banks within Europe	<input type="text"/>	Reference (optional) <input type="text"/>

We recommend you consult your financial adviser regarding the taxation treatment of regular withdrawals in your country of residence.

Signatures

I understand that any withdrawal(s) will be subject to my Policy Terms and Conditions and that this instruction will replace any previous regular withdrawal instruction held by RL360° Services.

	Policyholder/Trustee/Authorised Signatory 1	Policyholder/Trustee/Authorised Signatory 2
Signature	<input type="text"/>	<input type="text"/>
Date (dd/mm/yyyy)	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>
Country and place of birth	<input type="text"/>	<input type="text"/>
Date of birth (dd/mm/yyyy)	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>
Country of residence for tax purposes	<input type="text"/>	<input type="text"/>
Tax reference number (ie TIN/NI)	<input type="text"/>	<input type="text"/>
	Trustee/Authorised Signatory 3	Trustee/Authorised Signatory 4
Signature	<input type="text"/>	<input type="text"/>
Date (dd/mm/yyyy)	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>
Country and place of birth	<input type="text"/>	<input type="text"/>
Date of birth (dd/mm/yyyy)	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>
Country of residence for tax purposes	<input type="text"/>	<input type="text"/>
Tax reference number (ie TIN/NI)	<input type="text"/>	<input type="text"/>