

Appointment of financial adviser

This form is used to remove any standing arrangement you may have with an existing financial adviser and appoint a new financial adviser to service your policy.

I/We formally advise RL360 Life Insurance Company Limited (RL360° Services) of my/our decision to appoint the following company as my/our financial adviser to the specified policy. This instruction replaces any previous instructions.

Policy number	<input type="text"/>
Policyholder	<input type="text"/>
Name of financial adviser	<input type="text"/>
Address	<input type="text"/> <input type="text"/> <input type="text"/>
Postcode	<input type="text"/>
Contact name	<input type="text"/>
Telephone number	<input type="text"/>
Fax number	<input type="text"/>
Email address	<input type="text"/>
FCA number (if applicable)	<input type="text"/>
Old address	<input type="text"/> <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"/>

Signatures of all policy owner(s)/trustees/assignees

Name	<input type="text"/>	<input type="text"/>
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"/>
Name	<input type="text"/>	<input type="text"/>
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"/>

Important notes

1. When your new financial adviser has been appointed, we will write to your previous financial adviser to advise that they have been removed and no longer have authority to receive information regarding your policy.
2. Subject to any existing agreements, trail commission may be transferable to your new financial adviser, if applicable.
3. Any existing financial services charge will automatically be cancelled upon the appointment of a new financial adviser. If you wish a financial services charge to be paid to your new financial adviser, please complete the relevant financial services charge form.

Privacy and cookie policies

Our full privacy and cookie policies can be viewed at www.rl360.com/privacy or can be obtained by requesting a copy from our Data Protection Officer.

If you need any assistance filling in the appointment of financial adviser form, please contact our customer support team on: +44 (0)1624 638888

Please return the original of this completed form to: RL360° Services, RL360 House, Cooil Road, Douglas, Isle of Man, IM2 2SP, British Isles.