

## Lost Policy Questionnaire

### Lost Life Assurance Policy Information

Your Life Assurance Policy is a very important document that is evidence of your contract with RL360 Life Insurance Company Limited (RL360° Services) and the ownership of your Policy. Therefore if you are unable to produce your Life Assurance Policy when required, it may indicate that you are no longer the legal owner of the Policy and therefore you must provide us with evidence that this is not the case.

Having lost your Life Assurance Policy or having accidentally destroyed it, we require you to complete a two-part process before we can allow any alterations to be made to your Policy, and/or issue a replacement Life Assurance Policy.

#### Part 1

You will find a *Lost Life Assurance Policy Questionnaire* enclosed that you should complete in full and return to us for review. Depending on the information that you provide, we may have to request further details from you. All Policyholders, Trustees or Authorised Signatories are required to sign the *Lost Life Assurance Policy Questionnaire*.

#### Part 2

Upon our acceptance of your *Lost Life Assurance Policy Questionnaire*, we will then send you a Form of Indemnity to complete. Again, this should be completed in full and returned to us. We will not allow payment of surrender or the claim proceeds, and/or issue a replacement Policy Schedule, until we have received and accepted the *Form of Indemnity*. All Policyholders, Trustees or Authorised Signatories are required to sign the *Form of Indemnity*.

#### Important notes

The *Lost Life Assurance Policy Questionnaire* and *Form of Indemnity* will NOT be sent to you at the same time.

For further information or assistance with completing either form, please contact our Customer Services team on +44 (0) 1624 638888 in the first instance.

#### Data Protection

This form collects your personal data. We require your personal data so we can provide you with services relating to the performance of your contract. You may ask us to stop processing your data, however this may disrupt the services RL360° Services can provide to you or may stop us being able to assist you. To find out how long we will keep your data, please refer to our privacy policy at [www.rl360services.com/privacy](http://www.rl360services.com/privacy). Any data you provide to RL360° Services may be shared, if allowed by law, with other companies both inside and outside of RL360° Services 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.

You can receive a copy of the information RL360° Services holds about you free of charge by writing to our Data Protection Officer at: RL360° Services, International House, Cooil Road, Douglas, Isle of Man, IM2 2SP, British Isles, or by emailing [dpo@rl360.com](mailto:dpo@rl360.com). We can reserve the right to not send you your personal data in some circumstances - if we do we will write to you setting out the reasons why.

Our full privacy policy can be viewed at [www.rl360services.com/privacy](http://www.rl360services.com/privacy) or can be obtained by requesting a copy from our Data Protection Officer.

**Lost Life Assurance Policy Questionnaire**

**Important notes**

This is the first of a two-part process. Only after we have received a completed, original copy of this form and it has been reviewed and accepted by us, will we send you a Form of Indemnity to complete.

You will be required to complete a *Lost Life Assurance Policy Questionnaire* for each Policy where the Life Assurance Policy has been lost.

The answers you provide to the following questions may be incorporated into an Affidavit or Statutory Declaration.

Once you have completed this form please send it to: Policy Servicing, RL360° Services, RL360 House, Cooil Road, Douglas, Isle of Man, IM2 2SP, British Isles.

**Your details**

Policy number

	<b>Policyholder 1</b>	<b>Policyholder 2 (if applicable)</b>
First name(s)	<input type="text"/>	<input type="text"/>
Last name(s)	<input type="text"/>	<input type="text"/>
Current residential address and postcode	<input type="text"/>	<input type="text"/>

**Trust details (if applicable)**

Trust name

Correspondence address and postcode

**Company details (if applicable)**

Company name

Correspondence address and postcode

**Lost Life Assurance Policy questions**

- Where do you normally keep documents such as Life Assurance Policies?
- When and where was the Life Assurance Policy relating to the above numbered policy last seen?
- Who was the last person to see the Life Assurance Policy relating to the above numbered policy?
- Did another person keep the Life Assurance Policy on your behalf, on either a formal or informal basis? Yes  No
- If 'Yes' to the above, please state their name
- Have you contacted any of the following people to check if they are keeping the Life Assurance Policy for you:
  - The person named in question 5 above? Yes  No
  - Your bankers? Yes  No
  - Your solicitors? Yes  No
  - Your accountants? Yes  No
  - Your financial adviser? Yes  No

7. Has the above numbered policy ever been involved in proceedings in respect of bankruptcy? Yes  No
8. Has the above numbered policy ever been used as security? Yes  No
9. Has the above number policy ever been deposited with, assigned or charged to:
- A building society? Yes  No
- A bank? Yes  No
- Anyone else? Yes  No
10. Has the above numbered policy ever been impounded or restricted by the government of any country? Yes  No
11. Does the above numbered policy form part of any divorce settlement? Yes  No

Where you have answered 'Yes' to any of the questions numbered 7 to 11 please provide full details.

Please tell us what you believe to have happened to your Life Assurance Policy?

	<b>Policyholder/Trustee/Authorised Signatory 1</b>	<b>Policyholder/Trustee/Authorised Signatory 2</b>
Signature		
Dated (dd/mm/yyyy)	<input style="width: 30px; height: 20px;" type="text"/> <input style="width: 30px; height: 20px;" type="text"/> <input style="width: 60px; height: 20px;" type="text"/>	<input style="width: 30px; height: 20px;" type="text"/> <input style="width: 30px; height: 20px;" type="text"/> <input style="width: 60px; height: 20px;" type="text"/>
	<b>Trustee/Authorised Signatory 3</b>	<b>Trustee/Authorised Signatory 4</b>
Signature		
Dated (dd/mm/yyyy)	<input style="width: 30px; height: 20px;" type="text"/> <input style="width: 30px; height: 20px;" type="text"/> <input style="width: 60px; height: 20px;" type="text"/>	<input style="width: 30px; height: 20px;" type="text"/> <input style="width: 30px; height: 20px;" type="text"/> <input style="width: 60px; height: 20px;" type="text"/>