

CHANGE OF ADDRESS/CONTACT DETAILS

WHO IS THIS FORM FOR?

This form is for RL360 Insurance Company Limited (RL360) and RL360 Life Insurance Company Limited (RL360° Services) plan owners. It is for individual, trustee and corporate plan owners of single and regular payment plans who need to notify us of a change to their address or contact details.

Plan owners should also use this form to notify us of any address changes for the lives assured on their plan.

COMPLETING THIS FORM

We can only accept original written instructions by post that have been signed by all individual owners, trustees or authorised signatories. We will not accept instructions by email or fax.

Please complete in BLOCK capitals throughout.

Changes to the details of an individual plan owner (not held in trust)

All plan owners must sign the form. In the case of joint ownership, both owners must sign otherwise the form will be invalid.

Changes to the details of a trust

All trustees must sign the form.

Changes to the details of a company

The appropriate authorised signatories must sign on behalf of the company. Please ensure that the authorised signatory list we hold on file is up-to-date before sending the form.

In all cases the appropriate persons as detailed above must sign the form otherwise we cannot proceed with any changes.

IMPORTANT INFORMATION

Changes to your country of residence may affect the tax treatment of your plan as well as changing the investments which you can hold. We suggest that you speak to your financial and tax advisers in the first instance.

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.

WHERE SHOULD I SEND THE COMPLETED FORM?

Please return this form to:

Alterations Team
International House
Cooil Road
Douglas
Isle of Man
IM2 2SP
British Isles

NOTE

US Specified Person means a US citizen or tax resident individual, who either holds a US Passport, a US Green Card, has a US residential/correspondence address or who was born in the US and has not yet renounced their US citizenship. More information on US FATCA can be found at www.irs.gov/Businesses/Corporations/Foreign-Account-Tax-Compliance-Act-FATCA.

CHANGE OF ADDRESS/CONTACT DETAILS

| | | |
|---|---|---|
| Plan number(s) | <input type="text"/> | |
| | Plan owner 1 (or trustee) | Plan owner 2 (or trustee) |
| Name | <input type="text"/> | <input type="text"/> |
| New residential/ address and registered postcode (in full) | <input type="text"/> | <input type="text"/> |
| Date moved to new address (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"/> |
| New correspondence address (if different to above) | <input type="text"/> | <input type="text"/> |
| Home telephone ¹ | <input type="text"/> | <input type="text"/> |
| Work telephone ² | <input type="text"/> | <input type="text"/> |
| Mobile telephone | <input type="text"/> | <input type="text"/> |
| Email address | <input type="text"/> | <input type="text"/> |

Online services (for individual plan owners and individual trustees)
If you wish to access details of your plan online, you must supply us with the following information.

| | | |
|---|----------------------|----------------------|
| Email address | <input type="text"/> | <input type="text"/> |
| Password (you will only use this once) | <input type="text"/> | <input type="text"/> |
| Password hint | <input type="text"/> | <input type="text"/> |

If you require online servicing for your company please download our agreement and registration forms from our website - www.rl360.com/servicing

Company details (if applicable)

| | |
|---|---|
| Company name | <input type="text"/> |
| New registered address and postcode (in full) | <input type="text"/> |
| Date moved to new | <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> |
| New correspondence address and postcode (in full) | <input type="text"/> |
| Country of residence for tax purposes | <input type="text"/> |
| Company tax reference number(s) | <input type="text"/> |
| If it is not possible to provide a tax reference number, you must specify the reason here | <input type="text"/> |
| FATCA GIIN (if applicable) | <input type="text"/> |

¹ Required for individual plan owners and individual trustees.
² Required for corporate investors.

Plan owner/Trustee/Authorised Signatory 1

Plan owner/Trustee/Authorised Signatory 2

Signature

Date (dd/mm/yyyy)

Full name

Country of birth

Country or countries
of tax residence

Tax reference number (ie TIN/NI)

If unavailable, provide a functional equivalent (e.g. National Insurance Number, Social Security Number, Resident Card Number)

Are you a US Specified Person? Yes No

Yes No

Plan owner/Trustee/Authorised Signatory 3

Plan owner/Trustee/Authorised Signatory 4

Signature

Date (dd/mm/yyyy)

Full name

Country of birth

Country or countries
of tax residence

Tax reference number (ie TIN/NI)

If unavailable, provide a functional equivalent (e.g. National Insurance Number, Social Security Number, Resident Card Number)

Are you a US Specified Person? Yes No

Yes No