

Withdrawal Request

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

Important notes

1. Payment

RL360° Life Insurance Company (RL360° Services) will only make payments in the currency of your bond.

RL360° Services, does NOT make payments to third parties. We can only make payments to a bank account in the name of the policyholder(s). Instructions will be accepted from individuals who hold Power of Attorney (which we have details of on our records), however payments will only be made to the policyholder. Where the policy is held in trust, we can make payments to a bank account in the name of the trust or to one of the named trustees.

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

BACS - This is for payments being made in GBP to a UK/Channel Island or Isle of Man bank account only. It is free of charge and can take up to 5 working days to be credited to your bank account. The maximum payment limit BACS will allow is GBP300,000.00.

SEPA Credit Transfers - Similar to BACS, but this payment method can only be used for payments being made in Euros to a bank account in the EU. This is free of charge and can take up to 5 working days to be credited to your bank account. The maximum payment limit SEPA will allow is EUR50,000.00

Telegraphic Transfer (TT) - This can be used for any currency. There is a charge for this service which is approximately GBP20/EUR25/US30. This charge will be deducted from your policy before the payment is sent. There may also be additional charges applied by the beneficiary bank. Please refer to your own bank for further details.

5. 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 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, International House, Cooil Road, Douglas, Isle of Man, IM2 2SP, British Isles.

Note

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

Please tick the following boxes to indicate whether the form is to:

Set up a new withdrawal

Change an existing withdrawal instruction (either amount and/or frequency)

Change the bank details on an existing withdrawal instruction

Cancel an existing withdrawal instruction

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"/> |
| Daytime telephone number | <input type="text"/> | <input type="text"/> |
| Email address | <input type="text"/> | <input type="text"/> |

Trust details (if applicable)

| | |
|-------------------------------------|----------------------------------------------|
| Trust name | <input type="text"/> |
| Correspondence address and postcode | <input type="text"/> <input type="text"/> |
| Daytime telephone | <input type="text"/> |
| Email address | <input type="text"/> |

Company details (if applicable)

| | |
|-----------------------------------------------|----------------------------------------------|
| Company name | <input type="text"/> |
| Correspondence address and postcode (in full) | <input type="text"/> <input type="text"/> |
| Country of residence for tax purposes | <input type="text"/> |
| Company tax reference number(s) | <input type="text"/> |
| Daytime telephone | <input type="text"/> |
| Email address | <input type="text"/> |
| FATCA GIIN (if applicable) | <input type="text"/> |

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 | <input type="text"/> | | | |
| Currency of payment | GBP <input type="checkbox"/> | USD <input type="checkbox"/> | EUR <input type="checkbox"/> | |
| Withdrawal frequency | Monthly <input type="checkbox"/> | Quarterly <input type="checkbox"/> | Half-yearly <input type="checkbox"/> | Yearly <input type="checkbox"/> |
| The date we will start processing your withdrawal request (dd/mm/yyyy) | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> |

Payment instructions

If you are asking us to pay a withdrawal into a bank account that we have not previously made payments to or received payments from, please provide us with a copy of your latest bank statement for this account.

| | | | | | |
|------------------------------------------------|-----------------------------------------------|----------------------|------------------------------------------|----------------------|------------------------------------------|
| Payment method | TT (incurs a charge) <input type="checkbox"/> | OR | SEPA (EUR only) <input type="checkbox"/> | OR | BACS (GBP only) <input type="checkbox"/> |
| Bank name | <input type="text"/> | | | | |
| Bank address and postcode | <input type="text"/> | | | | |
| Account name | <input type="text"/> | | | | |
| Branch Swift Code (international) | <input type="text"/> | OR | Bank Sort Code (UK only) | <input type="text"/> | <input type="text"/> |
| | Swift Code must be either 8 or 11 digits | | | | |
| 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"/> |
| Full name | <input type="text"/> | <input type="text"/> |
| Country of birth | <input type="text"/> | <input type="text"/> |
| Country/countries of tax residence | <input type="text"/> | <input type="text"/> |
| Are you a US Specified Person? | Yes <input type="checkbox"/> No <input type="checkbox"/> | Yes <input type="checkbox"/> No <input type="checkbox"/> |
| Tax Identification Number (TIN) | <input type="text"/> | <input type="text"/> |

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

Signatures continued

| | 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"/> |
| Full name | <input type="text"/> | <input type="text"/> |
| Country of birth | <input type="text"/> | <input type="text"/> |
| Country/countries of tax residence | <input type="text"/> | <input type="text"/> |
| Are you a US Specified Person? | Yes <input type="checkbox"/> No <input type="checkbox"/> | Yes <input type="checkbox"/> No <input type="checkbox"/> |
| Tax Identification Number (TIN) | <input type="text"/> | <input type="text"/> |

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