

Regular Withdrawal Request

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

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

Please complete this form and return by one of the following methods:

1. Scan and email to: iom.policypayments@rl360.com

2. Post to: RL360° Services, International House, Cooil Road, Douglas, Isle of Man, IM2 2SP, British Isles.

We will accept emailed or faxed scans of instructions. However, we reserve the right to request original documents in some circumstances, so these must be retained in your records. Where the policyholder is resident in Africa, we will still require original signed instructions.

Important notes

1. Payment

RL360 Life Insurance Company Limited (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 policy

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

6. Specified US Persons

Specified US Person means a US citizen or tax resident individual who has a US residential/correspondence address or who either holds a US Passport, a US Green Card 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

If you choose Yes to being a Specified US Person, you will need to provide us with your US Taxpayer Identification Number (TIN) or US Social Security Number (SSN).

If you choose No but you have a US residential/correspondence address, hold a US Passport, a US Green Card or you were born in the US, you will need to provide us with documentary evidence that you are in the process of or have renounced your US Citizenship. RL360 can accept a certified copy of your DS-4083 form (also known as CLN - Certificate of Loss of Nationality) and/ or a certified copy of your passport in which you are obtaining new citizenship.

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

Correspondence address and postcode

Daytime telephone

Email address

Company details (if applicable)

Company name

Correspondence address and postcode (in full)

Country of residence for tax purposes

Company tax reference number(s)

Daytime telephone

Email address

FATCA GIIN (if applicable)

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"/> <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"/>
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)

Are you a Specified US Person? Yes No Yes No

Please see Important Notes for a definition of Specified US Person and for the information a Specified US Person must provide.

