Servicing

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 box	xes to indicate whether the form is to:	
Set up a new withdrawal		
Change an existing withdray	wal instruction (either amount and/or frequency)	
Change the bank details on	an existing withdrawal instruction	
Cancel an existing withdraw	val instruction	
Policyholder details		
Policy number		
·	Policyholder 1	Policyholder 2 (if applicable)
First name(s)		
Last name(s)		
Current residential address and postcode (in full)		
Daytime telephone number		
Email address		
Trust details (if applicable)		
Trust name		
Correspondence address and postcode		
Daytime telephone		
Email address		
Company details (if applica	ble)	
Company name		
Correspondence address and postcode (in full)		
and postcode (in ruii)		
Country of residence for tax purposes		
Company tax reference number(s)		
Daytime telephone		
Email address		
FATCA GIIN (if applicable)		

out below.	
Withdrawals	
Amount of payment	
Currency of payment	GBP USD EUR
Withdrawal frequency	Monthly Quarterly Half-yearly Yearly
The date we will start processing your withdrawal request (dd/mm/yyyy)	
Payment instructions	S S
	a withdrawal into a bank account that we have not previously made payments to or received vide us with a copy of your latest bank statement for this account.
Payment method	TT (incurs a charge) OR SEPA (EUR only) OR BACS (GBP only)
Bank name	
Bank address and postcode	
Account name	
Branch Swift Code (international)	OR Bank Sort Code (UK only) Swift Code must be either 8 or 11 digits
Account number or IBAN for banks within Europe	Reference (optional)
We recommend you consu of residence.	It your financial adviser regarding the taxation treatment of regular withdrawals in your country
Signatures	
	rawal(s) will be subject to my Policy Terms and Conditions and that this instruction will replace any linstruction held by RL360° Services.
Signature	Policyholder/Trustee/Authorised Signatory 1 Policyholder/Trustee/Authorised Signatory 2
Date (dd/mm/yyyy)	
Full name	
Country of birth	
Country/countries of tax residence	
Tax Identification Number (TIN)	
If unavailable, provide a fun Number)	ctional equivalent (e.g. National Insurance Number, Social Security Number, Resident Card
Are you a US Specified Person?	Yes No Yes No

I hereby request and authorise RL360° Services to pay a withdrawal(s) from my policy in accordance with the details as set

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

Signatures continued

	rustee/Authorisea Signatory 3	rrustee/Authorisea Signatory 4
Signature		
Date (dd/mm/yyyy)		
Full name		
Country of birth		
Country/countries of tax residence		
Tax Identification Number (TIN)		
If unavailable, provide a funct Number)	ional equivalent (e.g. National Insurance Number,	Social Security Number, Resident Card
Are you a Specified Y US Person?	res No	Yes No No

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



RL360 Life Insurance Company Limited is registered in the Isle of Man with limited liability under number 033520C. The registered office is International House, Cooil Road, Douglas, Isle of Man, IM2 2SP, British Isles. Authorised by the Isle of Man Financial Services Authority.

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