

Appointment of discretionary manager - client agreement

To: RL360 Life Insurance Company Limited (RL360° Services), International House, Cooil Road, Douglas, Isle of Man, IM2 2SP, British Isles.

Global Investor/Portfolio Bond* policy number	<input type="text"/>	(‘the bond’)
Policy owner’s name(s)	<input type="text"/>	
Name of discretionary manager	<input type="text"/>	
Discretionary manager contact name	<input type="text"/>	
Address of discretionary manager	<input type="text"/>	
	<input type="text"/>	
	<input type="text"/>	
Postcode	<input type="text"/>	
Telephone number of discretionary manager	<input type="text"/>	
Fax number of discretionary manager	<input type="text"/>	

I/We request the above named to be appointed discretionary manager to the account/fund to which the bond/portfolio is to be linked, subject to the Discretionary Managers terms and conditions of appointment of discretionary manager, a copy of which is attached and which I/we have read and understood, (and any further terms and conditions of the discretionary manager which I/we understand to be applicable subject to the Company’s terms).

I/We authorise RL360° Services to make a deduction from the account/fund of the charges detailed below at agreed intervals, which shall be retained by the discretionary manager. I/We understand that these charges will be deducted in addition to any charges which RL360° Services is entitled to deduct by virtue of the policy provisions.

Discretionary manager’s charges

Amount of charge per quarter/annum*

I/We request the discretionary manager to have regard to the investment objective and level of risk described below in managing the account/fund:

Please tick your selected investment objective

A balanced return from income and capital growth Primarily to maximise capital growth
Primarily to maximise income Not listed above, see copy attached

Please tick your selected attitude to risk

High Medium Low

The RL360° Services accepts no responsibility for ensuring that the investment objective and risk level set out in the discretionary manager Agreement are followed by the relevant discretionary manager.

I/We acknowledge that RL360° Services will not monitor compliance by the discretionary manager with the objective and stated risk level.

* Delete as appropriate

Name	<input type="text"/>
Policy owner signature	<input type="text"/>
Date (dd/mm/yyyy)	<input type="text"/> <input type="text"/> <input type="text"/>
Name	<input type="text"/>
Policy owner signature	<input type="text"/>
Date (dd/mm/yyyy)	<input type="text"/> <input type="text"/> <input type="text"/>
Name	<input type="text"/>
Policy owner signature	<input type="text"/>
Date (dd/mm/yyyy)	<input type="text"/> <input type="text"/> <input type="text"/>
Name	<input type="text"/>
Policy owner signature	<input type="text"/>
Date (dd/mm/yyyy)	<input type="text"/> <input type="text"/> <input type="text"/>

Notes

- RL360° Services' terms and conditions appointing the discretionary manager are attached.
- The discretionary manager's terms and conditions of appointment as discretionary manager must be attached to this form.

Owners of policies issued by RL360° Services receive the protection of the Isle of Man Compensation of Policyholders protection scheme, which covers an amount equal to 90% (subject to the provisions of the scheme) of RL360° Services' liability where it is unable to meet its financial obligations. RL360° reserves the right to adjust the returns to cater for any levy or charge made on it under the regulations or similar legislation.

Privacy policy

Our full privacy policy can be viewed at www.rl360.com/privacy or can be obtained by requesting a copy from our Data Protection Officer.