Application form for Children's Plan



This Application Form should be read in conjunction with the current LifePlan Brochure and Key Features.

A copy of the completed application and the LifePlan *Terms and Conditions* are available on request. If there is any doubt as to the relevance of any fact it should be included on the application form, as it is important that all information is fully disclosed. If more space is required please continue on a separate sheet of paper and ensure it is signed and dated by each applicant and/or each life assured.

PLEASE NOTE THAT INSUFFICIENT DETAILS MAY DELAY PROCESSING AND ACCEPTANCE

Refore you return this Application Form, please check the following

The Insurance (Anti-Money Laundering) Regulations 2008 requires all Isle of Man life companies to "make enquiries as to how an applicant has acquired the monies to be used as premium for, or contribution to, a policy." This reflects the Isle of Man's commitment to maintain the highest possible standards of business practice and to counter money laundering and the financing of terrorism.

RL360° has adopted a risk-based approach to meet these regulations, categorising all countries that we will accept business from into 1 of 3 tiers. Each tier has different source of wealth requirements. We have categorised countries according to their level of compliance with international regulatory standards.

Full details on the source of wealth procedures can be obtained from your financial adviser or can alternatively be downloaded from www.rl360.com/sourceofwealth.pdf

	ise tick:
Plea	
	Section 1 completed in all cases
	Section 2 completed in all cases
	Section 3 completed if applicable
	Section 4 completed in all cases
	Section 5 completed in all cases
	Section 6 completed in all cases
	Section 7 completed in all cases
	Section 8 completed in all cases
	Section 9 completed in all cases where any questions are answered 'yes' and further details are required
	Section 10 does not require completion, but should be read carefully
	Section 11 completed in all cases
	Section 12 completed in all cases
	Section 13 read in all cases
	Source of Wealth (where applicable):
	Income from employment - Certified copy of your last three months' payslips, confirmation of your income from your employer, copy of your recent accounts if you are self employed, or equivalent documentation.
	Other income or capital - Relevant certified documentation to verify the source of wealth.
	Any other source not listed - Relevant certified documentation to verify the source of wealth.
This	form is to be submitted with:
	a signed Personalised Illustration
	a completed Payment Method Form, or cheque made payable to RL360 Insurance Company Limited
	a certified copy of an identity document that includes a photograph for each applicant and life assured and evidence of their age
	certified documentary evidence of each applicant's and life assured's current residential address
	any supplementary forms

Please complete in BLOCK CAPITALS and in black or blue ink throughout. Please delete as appropriate where you see *

within 45 days after signing this form, please contact your financial adviser.

RL360 Insurance Company Limited ("the Company") accepts no responsibility for any payment until it has been received at a registered RL360° office. Provided that no further information is required and subject to acceptance of your application, your policy documents will be issued as soon as possible. In the unlikely event that you have not received your policy documents

Section 1 Applicant details

	First applicant	Second applicant (if applicable)
Title (please tick)	Mr Mrs Miss	Mr Mrs Miss
	Other (in full)	Other (in full)
Sex (please tick)	Male Female	Male Female
First name(s)		
Last name(s)		
Current residential address and postcode (in full)		
Country of residence		
Country of residence for tax purposes		
Tax reference number (ie TIN/NI)		
Telephone number		
Email address		
Marital status		
Nationality		
Date of birth (dd/mm/yyyy)		
Country and place of birth		
Reason for insurance and relationship to life assured		
Exact occupation and duties	First applicant	Second applicant (if applicable)
What is your exact occupation?		
What is your company name?		
What is your company name? What is the nature of your business?		
What is the nature of your business?	ombined earned/unearned income from all sourc	ees including any bonuses.
What is the nature of your business?		es including any bonuses.
What is the nature of your business? Please state the applicants' co		res including any bonuses. Previous year
What is the nature of your business? Please state the applicants' co	ombined earned/unearned income from all sourc	
What is the nature of your business? Please state the applicants' co Currency Earned Unearned	ombined earned/unearned income from all sourc	
What is the nature of your business? Please state the applicants' co Currency Earned Unearned	ombined earned/unearned income from all sourc This year Last year	
What is the nature of your business? Please state the applicants' concurrency Earned Unearned If you have stated annual unearned Online services	ombined earned/unearned income from all sourc This year Last year	Previous year
What is the nature of your business? Please state the applicants' concurrency Earned Unearned If you have stated annual unearned Online services	This year Last year arned income please provide details.	Previous year
What is the nature of your business? Please state the applicants' concurrency Earned Unearned If you have stated annual une Online services If you wish to access details of	This year Last year arned income please provide details.	Previous year

Section 2 Life assured (child) details

o be completed by the applicant(s) on behalf of the life assured (child). Life assured - the child to whom the policy will be assigned upon reaching the age of 18.				
Sex (please tick)	Male Female			
First name(s)				
Last name(s)				
Nationality				
Date of birth (dd/mm/yyyy)				
Current residential address and postcode (in full)				
Section 3 Correspo	ondence address			
the interests of the security of correspondence address and	rrespondence to be sent to a different address you can provide a correspondence address. In your policy, the company recommends that you carefully select the most reliable addressee and advise the company of any subsequent change of name and address during the course of your pts no responsibility for the consequences of sending correspondence to this address.			
Address and postcode for correspondence				
Country of residence				
Telephone number				
Section 4 Benefits				
Policy currency (only one currency is allowed in each policy)	UK Sterling US Dollars Euros Japanese Yen			
Amount of primary life cover	required			
Do you require critical illness	cover? Yes No			
If 'yes' please state the amour	nt of benefit required			
	this option is selected, the automatic premium increase option (Section 5 - Premiums) must be assen such that regular premiums increase by at least the same rate. '% or 10% simple basis: 5% annually			

Sec	ction 5	Premiums						
Pren	nium frequen	ncy Me	onthly	Quarterly	/	Half-yearly	Yearly	
Pren	nium amount	:						
Pren	nium term	W	/hole life					
		Fix	xed term for	years	5			
Pren	nium increase		es No yes, increasing at:			ected if the benefit in	ncrease option is select	ted.)
Sec	ction 6	Choice of	investment fu	unds				
Fund	d choice							
						e ensure that the pe 'EUR50/JPY5,000 n	rcentages invested tot ninimum.	al 100%
	Fund g	roup	Fund na	ame		ISIN	% of premium	า
-								
							Tot	al: 100%
Sec	ction 7	Lifestyle d	letails					
			oe answered in full ase provide additic				are not acceptable. If y	you
Life	assured (chil	d) details						
7.1	Please state	the life assured	d's height.	fee	et ir	nches	or cm	
7.2	Please state	the life assured	d's weight.	ро	unds		or kg	
7.3						ys or more in any one d length of stay in Se		No
7.4	of companie	es) or are they a	any existing insurar applying or expecti nd to discontinue a	ing to apply fo	r insurance b	nefits with the RL360 penefits with other)° group Yes	No
Curr	ent medical	attendant (this	s section MUST be	completed)				
						sician below. If they y consulted and the	have no usual medical reason.	
Nam	ne of doctor							
Num	nber of years	attended						
Add	ress (in full)							
Post	code							
Cou								
		(dd/mm/yyyy)						
	son for last vi							
Resu	ults of last vis	iit						

(If you require more space, please continue in Section 9.)

Section 8 Medical questions

8.1	Has the life assured (child) suffered from, or received, medical advice or treatment for any
	disease(s) of the heart, kidneys, brain or nervous system, or any form of cancer, or any other
	illness apart from minor childhood ailments or do any familial or congenital conditions exist?

Yes		No	
If you	nro.	vide ful	ı
-		Section	

8.2 Family history

Please provide details of the life assured's family history in the table below, including details of their current state of health or, if deceased, the cause of death. Of particular importance is if the life assured's father, mother or any brothers or sisters have died or suffered from heart disease, stroke, kidney disease, cancer, multiple sclerosis or diabetes before the age of 65, or suffered from any familial/hereditary disorders.

Please tell us the age at outset if the relative had cancer and the part of the body first affected.

Life assured (child's) relatives

Relatives	State of health (or if deceased please state cause of death)	Age (or age at death)
Father		
Mother		
Brothers		
(numbers born)		
Sisters		
(numbers born)		

If more space is required. please continue in Section 9.

Section 9 Additional information

Where any question has been answered yes, or where further details are required to any answer please provide as much information as possible in the space provided below. Please state which question the details relate to. If you require more space, please continue on a separate sheet.

Question number	Details

Section 10 Important notes

Your answers to the questions on this form will be used to assess the application and you must, therefore, answer them fully and to the best of your knowledge and belief. You must give us any other information which might be relevant and which could influence our decision. If you are unsure whether a particular fact is relevant, you should disclose it. Protection benefits may be forfeited if relevant information is found to have been withheld. Any policy of insurance issued pursuant to this application may be declared void even if the application has been formally accepted by the Company, where facts which are material to this application have been withheld. In such event, all monies paid may be forfeited. Please give careful consideration to the declaration before signing it.

This form should not be used by residents of the USA.

Before the policy comes into force, any change of facts contained in the answers given in this application must be notified to the Company in writing. The Company reserves the right to amend the terms on which your application may have been accepted or to withdraw acceptance in the event of any such change.

Your application is not binding and no policy will exist until the Company has issued a letter of acceptance, all conditions therein have been complied with and your policy schedule has been issued.

Full details of the policy can be obtained by reading LifePlan's *Terms and Conditions* which are available from the Company on request.

Section 11	Declaration	for ann	licant

the Company.

I being the parent(s)/legal guardian(s) of		(name of Life Assured
wish to apply for LifePlan on his/her behal	f as bare trustee(s).	
I confirm that as bare trustees for him/her knowledge and belief.	all statements made in the application are o	complete and true to the best of my/our
the Life Assured in relation to his/her phys	ition from any Medical Practitioner who has sical and mental health, and such Medical Pr e/she may have acquired with regard to the	actitioner is authorised and directed to
I understand that until 18 I will act for him/her as Policy Owner of	,	name of Life Assured) attains the age of
On (date obligations of the Policy Owner as set out	of Life Assured's 18th birthday) the Life Ass in the LifePlan <i>Terms and Conditions</i> .	ured will assume all the rights and
I also agree that this declaration and any r	elevant statement annexed thereto will be t	he basis of the policy between me and

I understand that until such time as I assign LifePlan to the Life Assured that the Company will continue to treat me as the legal owner of the policy and that upon the Life Assured's 18th birthday, The Company will not transfer the legal ownership of the policy to the Life Assured without first being instructed to do so and furthermore provided with a suitable deed of assignment.

- 11.1 I declare that I have read and understood the important notes within this application and that all the statements made by me, whether in my handwriting or not, are true and complete to the best of my knowledge and belief and I have disclosed all relevant information concerning this application whether or not covered by the questions in this application form or any supplementary questionnaires which might influence the Company's decision concerning this application including whether to assume risk and the amount of premium(s).
- 11.2 I will disclose to the Company any changes to the information given in this application which occur following the completion of this application but prior to the commencement of the policy.
- 11.3 I agree that all statements, together with any forms, statements, reports or other information completed or supplied by me or any party on my behalf, shall form the basis of the policy with the Company.
- 11.4 I have read and understood the Brochure and Key Features document and fully understand the charges that may be levied.
- 11.5 I agree to accept a policy in the form and containing the standard terms, conditions and rules ordinarily used by the Company for the type of benefits for which I have applied, and the Company shall not be bound in any way by any representations or undertakings made or given by any person save as contained in the policy as issued. It is further agreed and understood that, notwithstanding any statement made to the contrary by any person, no policy comes into existence and no liability whatsoever will attach to the Company as a result of this application unless and until the first premium has been paid and received by the Company and express written notice of acceptance of risk is issued by the Company.
- 11.6 I am not a resident of the USA and that to the best of my knowledge and belief I am not subject to any legislation that would make this application unlawful.
- 11.7 I confirm that on my own initiative I requested and received information about the policy from my financial adviser. On the basis of that information, I hereby apply for this policy. I understand that the policy is offered by the Company which is established in the Isle of Man and as such the Company is subject to the supervisory arrangements of the Isle of Man Government Insurance and Pensions Authority.

Section 11 Declaration for applicant continued

- 11.8 I understand that unless I provide a different address for correspondence in Section 3, all correspondence from the Company concerning this application and the policy, if accepted (including acknowledgement of safe receipt by the Company of my premiums, notification of renewal premiums due and of premiums not received by the Company when due) shall be sent to the first named trustee at the permanent address given for that trustee. I remember that any person who is advising me regarding the policy(s) for which I am applying, is acting for me and not on behalf of the Company.
- 11.9 I understand that personal data provided by me will be held in the files kept by the Company. I agree that data may be transferred internationally, including to my appointed financial adviser and to other entities which act as agents for the Company. I understand that I have the right to see certain information held by the Company.

I will disclose to the company any changes to the information given in this application which occur following the completion of this application but prior to the commencement of the policy.

Data Protection

Any data you provide to RL360° may be shared, if allowed by law, with other companies both inside and outside of the RL360° Group and to persons who act on your behalf. Data and information about you can be transferred outside of the Isle of Man and RL360° may be required to provide it to its regulator, its government or anyone else required by law.

RL360° will use your data and information to allow for the administration of your policy, prevent crime, prosecute criminals and for market research and statistics. RL360° will, at all times, make sure that your data and information is only used in ways that are allowed by law.

The Isle of Man Data Protection Act 2002 allows you, after paying a small fee, to receive a copy of the data and information RL360° holds about you.

For further information please write to: Data Protection Officer, RL360°, RL360 House, Cooil Road, Douglas, Isle of Man, IM2 2SP, British Isles.

	First applicant	Second applicant	
Signed			
Date (dd/mm/yyyy)			

Section 12 Financial adviser details

Date (dd/mm/yyyy)

This section is to be completed by your financial adviser.

The RL360° adviser number can be obtained from your regional office. Company name Adviser number Name of regulatory or authorising body (e.g. FCA) Regulatory number (if applicable) Financial Adviser's stamp (if this does not state an address, please complete company address details too) Full name Online services username (if registered) Work telephone number Mobile telephone number Email address I confirm that I have seen documentary proof of the applicant(s) identity, and certification of their residential address, and have, where applicable, attached suitably certified copies of both as set out in the completion notes, along with this application. Signed

Section 13 Your choice of payment methods

If you wish to pay by credit/debit card, standing order of direct debit, please complete the appropriate payment method form or alternatively, please follow the relevant instructions below.

Cheque

Please send your cheque, made payable to RL360 Insurance Company Limited to RL360°, RL360 House, Cooil Road, Douglas, Isle of Man, IM2 2SP.

Please note that GBP cheques can take up to five working days to clear. Other currency cheques may take considerably longer to clear.

Telegraphic transfer

If you are paying into your policy by telegraphic transfer please instruct your bank to quote your name as a reference.

Please make your payment to RL360 Insurance Company Limited through the appropriate bank below.

Currency	Swift code	IBAN	Sort code	Account number	Bank name	Account name
EUR	CITIGB2L	GB20 CITI 1850 0813 1418 02	18-50-08	13141802	Citibank, London	RL360
GBP	CITIGB2L	GB34 CITI 1850 0813 1420 35	18-50-08	13142035	Citibank, London	RL360
JPY	CITIGB2L	GB26 CITI 1850 0813 1415 00	18-50-08	13141500	Citibank, London	RL360
USD	CITIGB2L	GB54 CITI 1850 0813 1415 78	18-50-08	13141578	Citibank, London	RL360

Bank address

The bank address for all the above accounts is: Citibank, Citigroup Centre, Canada Square, Canary Wharf, London, E14 5LB, UK.







Credit and debit card mandate

Important

We are only able to accept credit or debit cards where the card displays one of the logos above and is prefixed with either a '4' or a '5'. We regret that we cannot accept American Express.

The maximum amount that can be collected by credit card is GBP99,999.99 (or currency equivalent) per premium.

We cannot accept payments from Rand or Zimbabwe dollar denominated cards.

I authorise you, until further notice in writing, to collect payments as detailed below:				
Premium currency (please tick appropriate box)	Sterling (GBP) US dollar (USD) Euro (EUR) Japanese yen (JPY)			
Premium amount in figures				
Premium amount in words				
Premium frequency	Monthly Quarterly Half-yearly Yearly			
Commencing on*	* this applies to initial premium only, future premiums are deducted up to 2 working days prior to premium due date.			
Card type	Mastercard/Eurocard Visa JCB			
Card issued by	(name of bank)			
Country of card issue				
Cardholder's name(s) (must be an applicant)				
Cardholder's address (as held by the card issuer)				
Card number				
Expiry date (mm-yy)				
	ance Company Limited (RL360°) will advise me of the amount to be paid and the dates on which 60° may only change these after giving me prior notice.			
I understand that this author	ity in favour of RL360° will remain in force until such time as I cancel it in writing to RL360°.			
Signature of cardholder(s)				
Date (dd/mm/yyyy)				

Additional information

In order to comply with the Isle of Man Insurance (Anti-Money Laundering Regulations) 2008, we may require additional source of wealth evidence if the bank that issued your credit or debit card is not registered in a Tier 1 country. For further information about Tier 1 and Tier 2 countries please refer to our source of wealth information document available online at www.rl360.com/sourceofwealth.pdf.

Any changes to your premiums, including as a result of automatic premium escalation, will be applied without the need for a further instruction.

Standing order instruction

Important

If you wish to change the amount you pay into your policy at a later date, including as a result of automatic premium escalation, you will need to complete a new standing order instruction. If you wish to cancel your standing order you will need to do this directly through your bank.

To the manager	Bank/Building Society
Bank address	
Reference number	
	be supplied by RL360° after receipt of the application and must be quoted by your bank on all do so may result in payment being rejected by our bankers.
Please debit the payment a	mount, together with any transfer charges, from my account detailed below:
Currency (please tick appropriate box)	Sterling (GBP) US dollar (USD) Euro (EUR) Japanese yen (JPY)
Payment amount in figures	
Payment amount in words	
Payment frequency	Monthly Quarterly Half-yearly Yearly
Payment commencement date (dd/mm/yyyy)	until further notice.
Name(s) of account holder(s)	
Branch Swift Code (for all non-GBP and Intern Swift Code must be either 8	
IBAN/Account number (all non-GBP accounts)	OR Account number (GBP UK Bank only)

Please tick the box in the table below that matches your premium currency.

Tick one	Currency	Swift code	IBAN	Sort code	Account number	Bank name	Account name
	EUR	CITIGB2L	GB20 CITI 1850 0813 1418 02	18-50-08	13141802	Citibank, London	RL360
	GBP	CITIGB2L	GB34 CITI 1850 0813 1420 35	18-50-08	13142035	Citibank, London	RL360
	JPY	CITIGB2L	GB26 CITI 1850 0813 1415 00	18-50-08	13141500	Citibank, London	RL360
	USD	CITIGB2L	GB54 CITI 1850 0813 1415 78	18-50-08	13141578	Citibank, London	RL360

Bank addresses

The bank address for all the above accounts EXCEPT the Japanese Yen account is: Citibank, Citigroup Centre, Canada Square, Canary Wharf, London, E14 5LB, UK.

The Japanese Yen bank account address is: HSBC, Building 2F, 11-1, Nihonbashi 3-chome, Chuo-ku, Tokyo 103-0027 Japan.

	Account holder/Authorised Signatory 1	Account holder/Authorised Signatory 2
Signed		
Full name		
Date (dd/mm/yyyy)		

Instruction to your bank or building society to pay by Direct Debit

Important Any changes to your premiur further instruction.	ns, including as a result of automatic pr	remium escalation, will be applied without the need for a			
Service User Number	2 7 0 0 5 0				
Name and full postal address	of your bank or building society branc	:h			
To the manager		Bank/Building Society			
Bank address					
Name(s) of account holder(s)					
Bank sort code (UK only)		Account number			
This Direct Debit Instruction	relates to my policy number, reference:				
Instruction to your bank or building society Please pay RL360 Insurance Company Limited Direct Debits from the account detailed in this Instruction, subject to the safeguards assured by the Direct Debit Guarantee. I understand that this Instruction may remain with RL360 Insurance Company Limited and, if so, details will be passed electronically to my bank/building society.					
	Account holder/Authorised Signatory	y 1 Account holder/Authorised Signatory 2			
Signed					
Full name					
Date (dd/mm/yyyy)					

This guarantee should be detached and retained by the payer.

The Direct Debit Guarantee



- · This Guarantee is offered by all banks and building societies that accept instructions to pay Direct Debits
- If there are any changes to the amount, date or frequency of your Direct Debit, RL360 Insurance Company Limited will notify you 14 working days in advance of your account being debited or as otherwise agreed. If you request RL360 Insurance Company Limited to collect a payment, confirmation of the amount and date will be given to you at the time of the request

Banks and building societies may not accept Direct Debit instructions from some types of account

- If an error is made in the payment of your Direct Debit by RL360 Insurance Company Limited or your bank or building society you are entitled to a full and immediate refund of the amount paid from your bank or building society If you receive a refund you are not entitled to, you must pay it back when RL360 Insurance Company Limited asks you to.
- You can cancel a Direct Debit at any time by simply contacting your bank or building society. Written confirmation may be required.
 Please also notify us.

To get in touch, call or email our Contact Centre.

T +44 (0)1624 681682 E csc@rl360.com

Website

www.rl360.com

Head Office - Isle of Man

RL360 House, Cooil Road, Douglas, Isle of Man, IM2 2SP, British Isles

T +44 (0)1624 681 681 **E** csc@rl360.com

Representative Office - Dubai

Office 1402, 14th Floor, Single Business Tower, Sheikh Zayed Road, Dubai, UAE.

T +971 4378 2700 **E** dubai@rl360.com

Regional Office - Hong Kong

Suite 3605, The Center, 99 Queen's Road Central, Hong Kong.

T +852 3929 4333 **E** hongkong@rl360.com

Issued by RL360 Insurance Company Limited. Registered Office: RL360 House, Cooil Road, Douglas, Isle of Man, IM2 25P, British Isles. Telephone: +44 (0)1624 681681. Telephone calls may be recorded. Website: www.rl360.com. RL360 Insurance Company Limited is authorised by the Isle of Man Financial Services Authority. Registered in the Isle of Man number 053002C.

You can count on us $\frac{R1}{360}$

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