

Security assignment form

Who is this form for?

This form is for individual, trustee or corporate policyholders who wish to use their RL360° policy as security (for example against a loan from a bank).

This form alone does not constitute a security assignment and must be accompanied by the following documentation:

- A copy of the security agreement detailing the entity with the interest. Documents which are not in English should be fully translated before being sent to RL360°.
- A certified copy or original ink Authorised Signatory List for the entity to which the policy is being pledged to as security.

Additional information

- The original policy documents DO NOT need to be returned.
- The *Deed of Assignment Form* should NOT be completed.

Completing this form

Please complete in BLOCK capitals throughout.

Where should I send the completed form?

Please post the completed form and the required additional documents to: Servicing Team, RL360°, RL360 House, Cooil Road, Douglas, Isle of Man, IM2 2SP, British Isles.

Section 1

Policyholder details

First policyholder's name

Second policyholder's name (if applicable)

RL360° policy number

I would like to inform RL360° that I am using the above mentioned policy as security with:

(Name of financial institution who has interest)

I understand that as a result of using my policy as security, RL360° will not accept any transaction instructions from me (for example, dealing/switching instruction, regular withdrawal instructions) without appropriate authorisation from the entity detailed in Section 2.

	First policyholder	Second policyholder (if applicable)
Signed	<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"/>

Section 2

Name of company/bank	<input type="text"/>
Address	<input type="text"/>
	<input type="text"/>
Contact person	<input type="text"/>
Telephone number	<input type="text"/>
Email address	<input type="text"/>
Global Intermediary Identification Number (FATCA GIIN)	<input type="text"/>

We have taken security against the above mentioned RL360° bond and we enclose a copy of the security agreement and our original ink or certified true copy authorised signatory list.

We will inform RL360° in writing once our interest in the above policy has ceased.

	Authorised Signatory 1	Authorised Signatory 2
Signed	<input type="text"/>	<input type="text"/>
Full name	<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"/>

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.