

AUTHORISATION TO PAY A FINANCIAL ADVISER FEE



Please complete in BLOCK capitals throughout.

Plan reference:

Who is this form for?

This form is for applicants who wish to authorise RL360 to pay a financial adviser fee to:

(adviser company and address)

RL360 adviser number:

We can only accept instructions that have been signed by all applicants.

Important notes

1. As this instruction will result in a deduction from your plan to meet the fee you are agreeing to pay, you should note that this deduction may be treated as a withdrawal in your country of residence. You should consult your tax adviser to determine whether this could affect you.
2. RL360 cannot be held responsible for any future tax liability that may accrue to the adviser as a result of a failure to levy tax where it later transpires that it should have been charged. The adviser is responsible for deciding whether or not the service they are providing is subject to any additional taxes.
3. This fee is calculated and paid each quarter from the plan anniversary.
4. The value of any additional payments made to the original plan will be treated as part of its value when the fees are calculated.
5. This agreement shall be subject to, and interpreted in, accordance with the laws of the Isle of Man.
6. I confirm that I will inform RL360 in writing should I wish to terminate payment of this fee.
7. I understand that any existing payment to my appointed Financial Adviser ceases and is replaced by this payment with immediate effect.
8. I understand that, as a result of my request, RL360 may have to alter the Terms and Conditions of my contract to facilitate this payment to my requested Financial Adviser. I request that all required changes are made to my Terms and Conditions and they are effective immediately.

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.

Applicant(s) to complete

I authorise RL360 to pay the following fee to my financial adviser:

Financial adviser fee

% per year, paid quarterly in arrears as percentage of my plan value (the fee should not be more than 1.5% per year).

Where this fee is used in conjunction with an investment adviser fee, the two fees combined cannot be more than 2.0% per year.

Applicant 1

Signed

Full name

Date (dd/mm/yyyy)

Applicant 2