

ACCOUNT CREATION AND/OR USER REGISTRATION FORM

Account creation and user registration for standalone accounts and network members

Who is this form for?

This form should be used by Master Account Holders to create a name for their Master Account and appoint Master Users to it.

What is a Master Account?

Our Online Service Centre (OSC) offers different levels of user access. The Master Account is the highest level and at least 1 administrator, known as a "Master User" (MU), must be appointed to manage the account. The MU will have the ability to create "Sub-Users" (SU) without the need to complete further forms.

Completing this form

Please make sure that you complete and sign a Master Account Agreement and send it alongside this form (for new account set ups). We cannot create a Master Account until we have received the Agreement.

Please complete in BLOCK capitals and make sure that you fill in all the fields, as a failure to do so can lead to delays. If you need help please contact our Web Support Team on +44 (0)1624 681685 or alternatively you can email websupport@rl360.com.

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.

FOR MASTER ACCOUNTS

Please confirm which you are: Financial/investment adviser Corporate trustee Company policyholder

Part 1

Please confirm whether you are setting up the account for the first time or adding Master Users to an existing Master Account (please tick as appropriate).

First time setup New users for existing account

If you are an adviser, please provide us with your company name, current address and RL360 Insurance Company Limited or RL360 Life Insurance Company Limited (RL360) adviser number. If you are a corporate trustee please provide your trust code, and if you are a company policyholder please provide your policy number.

Company name

Registered office address (including postcode and country)

Agency reference number, trust code or policy number

Part 2

Do you want to provide us with a name for your Master Account?

Part 3

Please provide full details of the Master User you wish to set up as part of your Master Account.

Failure to complete all the details can lead to delays processing your request.

Title (please tick) Mr Mrs Miss Other (in full)

First name(s)

Last name(s)

Date of birth (dd/mm/yyyy)

Position held

Email address

Telephone number

Single use password

Password reminder

Please tick this box if you would like the user to have access to commission statements online. If this option is selected then please arrange for the form to be signed by a Company Director.

By signing below, Master Users agree to abide by the terms and conditions as described within the Master Account Agreement.

New Master User

Signed Date (dd/mm/yyyy)

I agree to RL360 setting up the above Master User to the stated Master Account.

Company Director/Partner/Authorised Signatory on behalf of the Master Account Holder

Signed Date (dd/mm/yyyy)

Full name

Position held