

APPOINTMENT OF FINANCIAL ADVISER

This form is used to remove any standing arrangement you may have with an existing financial adviser and appoint a new financial adviser to service your plan.

I/We formally advise RL360 Insurance Company Limited of my/our decision to appoint the following company as my/our financial adviser to the specified plan. This instruction replaces any previous instructions.

The RL360 adviser number can be obtained from your regional office.

Please ensure you complete all sections below:

Plan reference	<input type="text"/>
Plan owner	<input type="text"/>
Name of company/ financial adviser	<input type="text"/>
RL360 adviser number	<input type="text"/>
Address	<input type="text"/>
Postcode	<input type="text"/>
Contact name	<input type="text"/>
Online services username (if registered)	<input type="text"/>
Telephone number	<input type="text"/>
Email address	<input type="text"/>
FCA number (if applicable)	<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"/>

SIGNATURES OF ALL PLAN OWNER(S)/TRUSTEES/ASSIGNEES

Full name	<input type="text"/>	<input type="text"/>
Signature	<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"/>
Full name	<input type="text"/>	<input type="text"/>
Signature	<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"/>

IMPORTANT NOTES

1. When your new financial adviser has been appointed, we will write to your previous financial adviser to advise that they have been removed and no longer have authority to receive information regarding your plan.
2. If the existing investment adviser is the same as the financial adviser being removed, they will also be removed as the investment adviser on the plan. If you wish for your new financial adviser to be set up as an investment adviser, please complete the relevant investment adviser appointment form available on the RL360 online centre.

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.

If you need any assistance filling in the appointment of financial adviser form, please contact our customer support team on: +44 (0)1624 681681

Please return a scanned copy of this form to alterations@rl360.com or alternatively you can post this to: Alterations Team, RL360, International House, Cooil Road, Douglas, Isle of Man, IM2 2SP, British Isles.