

REQUEST TO PAY A FINANCIAL ADVISER CHARGE

Please complete in BLOCK capitals throughout.

Plan reference:

Who is this form for?

This form is for applicants who wish to request the payment of a financial adviser charge from their plan. The payment will be made to:

(adviser company and address)

RL360 adviser number:

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

Important notes

1. 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.
2. The charge will commence from the date we receive your completed form. It will be calculated and paid each quarter from the plan anniversary.
3. The value of any additional payments made to the original plan will be treated as part of its value when the charges are calculated.
4. This agreement shall be subject to, and interpreted in, accordance with the laws of the Isle of Man.
5. We confirm that we will inform RL360 in writing should we wish to terminate payment of this charge. Any charge accrued to the point where the payment is terminated will be deducted from the plan and paid to the financial adviser. No further financial adviser charge will be taken.
6. I understand that any existing payment to my appointed Financial Adviser ceases and is replaced by this payment with immediate effect.
7. 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 request the payment of a financial adviser charge from my plan. I authorise RL360 to pay the financial adviser charge to my financial adviser in line with the following:

Financial adviser charge

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

Note: where this charge is used in conjunction with an investment adviser charge, the two charges combined cannot be more than 2.0% per year.

	Applicant 1	Applicant 2
Signed		
Full name		
Date (dd/mm/yyyy)	<input style="width: 20px; height: 20px;" type="text"/> <input style="width: 20px; height: 20px;" type="text"/> <input style="width: 20px; height: 20px;" type="text"/> <input style="width: 20px; height: 20px;" type="text"/> <input style="width: 20px; height: 20px;" type="text"/> <input style="width: 20px; height: 20px;" type="text"/>	<input style="width: 20px; height: 20px;" type="text"/> <input style="width: 20px; height: 20px;" type="text"/> <input style="width: 20px; height: 20px;" type="text"/> <input style="width: 20px; height: 20px;" type="text"/> <input style="width: 20px; height: 20px;" type="text"/> <input style="width: 20px; height: 20px;" type="text"/>