

WITHDRAWAL REQUEST

WHO IS THIS FORM FOR?

This form is for policyholders who wish to take a one-off withdrawal from their policy, set-up a regular withdrawal or amend an existing regular withdrawal.

If you wish to surrender your policy in full, or surrender segments, please use our Surrender Request form, which is available by contacting us.

Withdrawals are not permitted where you have submitted a request to surrender your policy in full. If you would like to discuss your options please contact RL360 on: +44 (0)1624 681682.

COMPLETING THIS FORM

By completing this form you will be requesting a withdrawal from your policy. We recommend that you speak to your financial adviser before doing this, so that they can make you aware of any tax charges that may apply. Depending on your policy early withdrawal penalties may apply, please consult your policy literature before requesting a withdrawal.

If you need help completing this form please contact our Customer Services Team on +44 (0)1624 681682 or alternatively you can email csc@rl360.com.

We can only accept a scanned or faxed copy of this instruction if it has been signed by all individual owners, trustees or authorised signatories. Please note we do not require the original copy however we do reserve the right to ask for the original form if we deem this appropriate. We will require advanced notice before we are able to start or amend regular withdrawals.

Please complete in BLOCK capitals throughout.

Please make sure you read the important notes section of this form.

WHEN YOU HAVE COMPLETED THIS FORM

For all policies (except Hong Kong)

Please send the completed form to servicing@rl360.com or alternatively you can post this to:

Policy Servicing Team
International House
Cooil Road
Douglas
Isle of Man
IM2 2SP
British Isles

For Hong Kong policies

If you hold a Hong Kong policy, as designated by an 'H' at the start of your policy number, then please send it to: RL360, Room 1403, Sun House, 181 Des Voeux Road Central, Sheung Wan, Hong Kong

Please fax it to: +852 2169 0181.

A confirmation letter will be sent to you once we have set up or amended your regular withdrawals. For one-off withdrawals, a confirmation letter will be sent to you once we have released your payment.

POLICYHOLDER DETAILS

Policyholder details

RL360 policy number

Policyholder 1

Policyholder 2 (if applicable)

First name(s)

Last name(s)

Correspondence address and postcode (if different from residential address)

Current residential address and postcode (in full)

Daytime telephone

Email address

Trust details (if applicable)

Trust name

Correspondence address and postcode

Daytime telephone

Email address

Company details (if applicable)

Company name

Correspondence address and postcode

Country or countries of tax residence

Company tax reference number(s)

FATCA GIIN (if applicable)

Daytime telephone

Email address

SIGNATURES

I understand that any withdrawal(s) will be subject to my Policy Terms and Conditions and that this instruction will replace any previous regular withdrawal instruction held by RL360 Insurance Company Limited.

	Policyholder/Trustee/Authorised Signatory 1	Policyholder/Trustee/Authorised Signatory 2
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"/>
Full name	<input type="text"/>	<input type="text"/>
Country or countries of tax residence	<input type="text"/>	<input type="text"/>
Tax reference number (ie TIN/NI)	<input type="text"/>	<input type="text"/>

If unavailable, provide a functional equivalent (e.g. National Insurance Number, Social Security Number, Resident Card Number)

Are you a Specified US Person? Yes No Yes No

	Policyholder/Trustee/Authorised Signatory 3	Policyholder/Trustee/Authorised Signatory 4
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"/>
Full name	<input type="text"/>	<input type="text"/>
Country or countries of tax residence	<input type="text"/>	<input type="text"/>
Tax reference number (ie TIN/NI)	<input type="text"/>	<input type="text"/>

If unavailable, provide a functional equivalent (e.g. National Insurance Number, Social Security Number, Resident Card Number)

Are you a US Specified Person? Yes No Yes No

IMPORTANT NOTES

Withdrawals

Any withdrawals taken from your policy will be subject to the minimum withdrawal amounts as detailed in your policy literature. The withdrawal amount may need to be reduced if it will take your policy below the minimum allowable policy value.

Tax

UK residents may be subject to a tax charge if withdrawals are in excess of the 5% cumulative withdrawals available (of initial and any additional investments) in any given policy year. The tax treatment of withdrawals paid from your policy will depend upon your personal circumstances at that time. We recommend that you speak to your financial adviser or tax professional about your tax situation before taking action on your policy.

General

Depending on the investment(s) to which the value of your policy is linked, some investment managers may have terms and conditions that prevent us from realising a cash value in a timely fashion, and this could delay your withdrawal payment.

Where applicable, please ensure that the authorised signatory list(s) that we hold for this policy are up-to-date before submitting withdrawal instructions. Where authorised signatories have changed and we are unable to match those on this form with our records, this will delay the withdrawal. We may also require further information for the purposes of Anti-Money Laundering.

Specified US Person means a US citizen or tax resident individual who has a US residential/correspondence address or who either holds a US Passport, a US Green Card or who was born in the US and has not yet renounced their US citizenship. More information on US FATCA can be found at: www.irs.gov/Businesses/Corporations/Foreign-Account-Tax-Compliance-Act-FATCA.

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.