

Additional contribution form

Please complete this form in BLOCK CAPITALS throughout.

Section 1 Policy details

Policy number

Are you notifying us of any changes to your personal/company/trustee details as part of this application? Yes ☐ No ☐

If yes, please provide details in Section 6 – Your additional notes.

	Policyholder 1	Policyholder 2 (if applicable)
Name	<input type="text"/>	<input type="text"/>
Country of residence for tax purposes	<input type="text"/>	<input type="text"/>
Tax reference number (ie TIN/NI)	<input type="text"/>	<input type="text"/>

If the policyholder is a trust, company or corporate trustee, please complete Section 3 and Section 4.

Section 2 Contribution details

Do you want to increase your regular premiums or top-up with a single premium injection?

Regular premium increase ☐ Single premium injection ☐

Regular premium details

The premium currency, method of payment and payment frequency for increased regular premiums will be the same as your current premiums.

Current regular premium	<input type="text"/>
Additional regular premium*	<input type="text"/>
Total regular premium	<input type="text"/>

* For details on the minimum additional premiums applicable to your policy, please refer to the relevant policy literature.

Unless otherwise instructed, additional regular premiums will be invested as per your current instructions.

Single premium injection

Additional single premium injection (currency and amount)

Payment details

Banker's draft/cheque ☐ (please complete the banking details on the next page)

Telegraphic transfer ☐ (please complete the banking details on the next page)

Section 2 Contribution details continued

Payments by banker’s draft/cheque or telegraphic transfer

Please confirm the details of the bank that you will be making payment from.

Bank name

Bank address and postcode

Account holder’s name

Branch Swift Code

(for all non-GBP and International payments)

Swift Code must be either 8 or 11 digits

OR

Bank Sort Code

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(for UK GBP payments only)

IBAN

(all non-GBP accounts)

OR

Account number

(GBP UK Bank only)

Account held for

Years

Months

Is the money being invested your own? Yes ☐ No ☐

If **no**, please provide full details in Section 6 – Your additional notes (we may ask for further documentary evidence).

Fund selection for the single premium injection only

ISIN	Fund name	Currency	Percentage of premium
			%
			%
			%
			%
			%
			%
			%
			%
			%
Total			100%

Please note that the maximum number of funds allowed is 10 (including existing funds).

Section 3 Supplementary section for corporate trustees

Corporate trustee name	<input type="text"/>
Global Intermediary Identification Number (FATCA GIIN)	<input type="text"/>

Section 4 Supplementary section for trusts, companies and corporate trustees

Trusts

Trust name	<input type="text"/>	
	Settlor 1	Settlor 2
Name	<input type="text"/>	<input type="text"/>
Country of residence for tax purposes	<input type="text"/>	<input type="text"/>
Tax reference number (ie TIN/NI)	<input type="text"/>	<input type="text"/>
	Trustee 1	Trustee 2
Name	<input type="text"/>	<input type="text"/>
Country of residence for tax purposes	<input type="text"/>	<input type="text"/>
Tax reference number (ie TIN/NI)	<input type="text"/>	<input type="text"/>
	Trustee 3	Trustee 4
Name	<input type="text"/>	<input type="text"/>
Country of residence for tax purposes	<input type="text"/>	<input type="text"/>
Tax reference number (ie TIN/NI)	<input type="text"/>	<input type="text"/>

Companies

Company name	<input type="text"/>	
	Executive Director/Partner 1	Director/Partner 2
Name	<input type="text"/>	<input type="text"/>
Country of residence for tax purposes	<input type="text"/>	<input type="text"/>
Tax reference number (ie TIN/NI)	<input type="text"/>	<input type="text"/>

Shareholders and beneficial interest

For persons who have a shareholding or beneficial interest of 25% or more please tell us:

First name(s)	Last name(s)	Position	Shareholding (%)	Country of residence for tax purposes	Tax reference no. (ie TIN/NI)

Section 5 Your source of wealth

The Insurance (Anti-Money Laundering) Regulations 2008 requires all Isle of Man life companies to “make enquiries as to how an applicant has acquired the monies to be used as premium for, or contribution to, a policy.” This reflects the Isle of Man’s commitment to maintain the highest possible standards of business practice and to counter money laundering and the financing of terrorism.

RL360° has adopted a risk-based approach to meet these regulations, categorising all countries that we will accept business from into 1 of 3 tiers. Each tier has different source of wealth requirements. We have categorised countries according to their level of compliance with international regulatory standards.

Full details on the source of wealth procedures can be obtained from your financial adviser or can be downloaded from www.rl360.com/sourceofwealth.pdf

You must complete the annual salary question in full, in all cases and for both applicants as applicable. You must also complete all other relevant questions within this section. Please use Section 6 if you require more space for details.

	First policyholder	Second policyholder (if applicable)
Annual salary plus bonuses		
Income this year (include currency)	<input type="text"/>	<input type="text"/>
Income last year (include currency)	<input type="text"/>	<input type="text"/>
Occupation	<input type="text"/>	<input type="text"/>
Employer’s company name	<input type="text"/>	<input type="text"/>
Nature of business	<input type="text"/>	<input type="text"/>
Other unearned income		
Amount received (include currency)	<input type="text"/>	<input type="text"/>
Received from	<input type="text"/>	<input type="text"/>
Date received (dd/mm/yyyy)	<input type="text"/> <input type="text"/> <input type="text"/>	<input type="text"/> <input type="text"/> <input type="text"/>
Savings		
Amount received (include currency)	<input type="text"/>	<input type="text"/>
Bank where savings were held	<input type="text"/>	<input type="text"/>
How were savings accumulated?	<input type="text"/>	<input type="text"/>
Property or asset sale		
Amount received (include currency)	<input type="text"/>	<input type="text"/>
Address of property sold or asset type	<input type="text"/>	<input type="text"/>
How long held	<input type="text"/>	<input type="text"/>
Date of sale (dd/mm/yyyy)	<input type="text"/> <input type="text"/> <input type="text"/>	<input type="text"/> <input type="text"/> <input type="text"/>
Company profits		
Profits this year (include currency)	<input type="text"/>	<input type="text"/>
Profits last year (include currency)	<input type="text"/>	<input type="text"/>
Industry	<input type="text"/>	<input type="text"/>

Section 5 Source of wealth details continued

Company sale

Amount received (include currency)	<input type="text"/>	<input type="text"/>
Company name	<input type="text"/>	<input type="text"/>
Company industry	<input type="text"/>	<input type="text"/>
Date received (dd/mm/yyyy)	<input type="text"/> <input type="text"/> <input type="text"/>	<input type="text"/> <input type="text"/> <input type="text"/>

Maturing investments or policy claim

Amount received (include currency)	<input type="text"/>	<input type="text"/>
From which company	<input type="text"/>	<input type="text"/>
Date received (dd/mm/yyyy)	<input type="text"/> <input type="text"/> <input type="text"/>	<input type="text"/> <input type="text"/> <input type="text"/>

Amount received (include currency)	<input type="text"/>	<input type="text"/>
From which company	<input type="text"/>	<input type="text"/>
Date received (dd/mm/yyyy)	<input type="text"/> <input type="text"/> <input type="text"/>	<input type="text"/> <input type="text"/> <input type="text"/>

Other (such as a lottery or betting win, gift or inheritance. For inheritance please state from who.)

Amount received (include currency)	<input type="text"/>	<input type="text"/>
Source	<input type="text"/>	<input type="text"/>
Date received (dd/mm/yyyy)	<input type="text"/> <input type="text"/> <input type="text"/>	<input type="text"/> <input type="text"/> <input type="text"/>

RL360° reserves the right to request further documentary evidence of source of wealth should it be considered necessary.

Section 6 Your additional notes

If you have no additional notes, please continue to Section 7 - Your declaration.

Section 7 Your declaration

My application

I understand that my additional premium will be treated in line with the terms and conditions of my policy.

Availability

I confirm that to the best of my knowledge and belief, I am not subject to any legislation that would make my investment into Paragon unlawful.

Investment

I understand that RL360° is not responsible for the choice of investments within my Paragon policy.

I agree to RL360° acting on investment instructions received from me or my appointed adviser, despite the fact I may not have read all of the documentation issued by the investment manager for each fund.

Legal

I agree to the policy being governed by Isle of Man law and to the Isle of Man Courts having the right to decide any case that may be brought in relation to the policy.

I accept that RL360° can bring the contract to an end if I have failed to detail any facts that may influence the decision to accept this application.

I confirm that this application was signed in (give country)

	Policyholder/Trustee/Authorised Signatory 1	Policyholder/Trustee/Authorised Signatory 2
Signed	<div></div>	<div></div>
Date (dd/mm/yyyy)	<div></div> <div></div> <div></div>	<div></div> <div></div> <div></div>
	Trustee/Authorised Signatory 3	Trustee/Authorised Signatory 4
Signed	<div></div>	<div></div>
Date (dd/mm/yyyy)	<div></div> <div></div> <div></div>	<div></div> <div></div> <div></div>

Section 7 Your adviser's declaration

This section is to be completed by your financial adviser.

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

Company name	<input type="text"/>
RL360° adviser number	<input type="text"/>
Name of regulatory or authorising body	<input type="text"/>
Regulatory number (if applicable)	<input type="text"/>
Financial Adviser's stamp (if this does not state an address, please complete company address details too)	<input type="text"/>
Full name	<input type="text"/>
Online services username (if registered)	<input type="text"/>
Work telephone number	<input type="text"/>
Mobile telephone number	<input type="text"/>
Email address	<input type="text"/>

I confirm that I have seen documentary proof of the applicant(s) identity, and certification of their residential address, and have, where applicable, attached suitably certified copies of both as set out in the completion notes, along with this application.

Signed

Date (dd/mm/yyyy)