Friends Provident International

Change of address/contact details

Who is this form for?

This form is for Friends Provident Intentional ("FPI") policy owners. It is for individual, trustee and corporate policy owners of single and regular payment policies who need to notify us of a change to their address or contact details.

Policy owners should also use this form to notify us of any address changes for the lives assured on their policy.

Completing this form

We can only accept a 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.

Please complete in BLOCK capitals throughout.

Changes to the details of an individual policy owner (not held in trust)

All policy owners must sign the form. In the case of joint ownership, both owners must sign otherwise the form will be invalid.

Changes to the details of a trust

All trustees must sign the form.

Changes to the details of a company

The appropriate authorised signatories must sign on behalf of the company. Please ensure that the authorised signatory list we hold on file is up-to-date before sending the form.

In all cases the appropriate persons as detailed above must sign the form otherwise we cannot proceed with any changes.

Important information

Changes to your country of residence may affect the tax treatment of your policy as well as changing the investments which you can hold. We suggest that you speak to your financial and tax advisers in the first instance.

Privacy policy

Our full privacy policy can be viewed at **https://www.fpinternational.com/legal/privacy-and-cookies** or can be obtained by requesting a copy from our Data Protection Officer.

Where should I send the completed form?

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

Customer Services Team
Friends Provident International Limited
Royal Court
Castletown
Isle of Man
IM9 1RA

Note

US Specified Person means a US citizen or tax resident individual, who either holds a US Passport, a US Green Card, has a US residential/correspondence address 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.

Change of address/contact details

Policy number(s)		
	Policy owner 1 (or trustee)	**Policy owner 2 (or trustee)**
Name		
New residential/ registered address and postcode (in full)		
Date moved to new address (dd/mm/yyyy)		
Correspondence address (if no correspondence address is provided, we will use the address provided above)		
Is this address for	☐ You ☐ Your financial adviser	☐ A friend ☐ A family member
Home telephone[1]		
Work telephone[2]		
Mobile telephone		
Email address		
Employment status	☐ Employed Full Time ☐ Retired ☐ Employed Part Time ☐ Student ☐ Self Employed ☐ Homemaker ☐ Unemployed	☐ Employed Full Time ☐ Retired ☐ Employed Part Time ☐ Student ☐ Self Employed ☐ Homemaker ☐ Unemployed
Employment Role	☐ Employee ☐ Key Controller ☐ Business Owner ☐ Sole Trader	☐ Employee ☐ Key Controller ☐ Business Owner ☐ Sole Trader
Occupation		
Nature of Business		

[1] Required for individual policy owners and individual trustees.

[2] Required for corporate investors.

Company details (if applicable)

Company name

New registered address and postcode (in full)

Date moved to new address (dd/mm/yyyy)

New correspondence address and postcode (in full)

Country of residence for tax purposes

Company tax reference number(s)

If it is not possible to provide a tax reference number, you must specify the reason here

FATCA GIIN (if applicable)

Politically Exposed Persons

A Politically Exposed Person (PEP) is a person who is, or who has been, entrusted with prominent public functions. This also includes their close family members and their close associates.

Examples of PEPs include political figures, member of the judiciary, diplomatic service officers, managers and supervisors of state owned enterprises and senior ranking military officers.

Are you, any of your family members or any of your close associates a PEP? ☐ Yes ☐ No

If Yes, please provide the following details and complete the supplementary **Source of Wealth Form**.

Surname

Forename(s)

Position held as PEP

Country position held

Dates position held (dd/mm/yyyy) From To

If the PEP is a family member or close associate, please confirm the relationship

	Policy owner/Trustee/Authorised Signatory 1	Policy owner/Trustee/Authorised Signatory 2
Signature		
Date (dd/mm/yyyy)		
Full name		
Country of birth		
Country or countries of tax residence		
Tax reference number (ie TIN/NI)		

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

	Policy owner/Trustee/Authorised Signatory 3	Policy owner/Trustee/Authorised Signatory 4
Signature		
Date (dd/mm/yyyy)		
Full name		
Country of birth		
Country or countries of tax residence		
Tax reference number (ie TIN/NI)		

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

Friends Provident International Limited: Registered and Head Office: Royal Court, Castletown, Isle of Man, British Isles, IM9 1RA. Isle of Man incorporated company number 11494C. Authorised and regulated by the Isle of Man Financial Services Authority. Provider of life assurance and investment products. **Singapore branch:** 182 Cecil Street, Level 17 Frasers Tower, Singapore 069547. Registered in Singapore No. T06FC6835J. Licensed by the Monetary Authority of Singapore to conduct life insurance business in Singapore. Member of the Life Insurance Association of Singapore. Member of the Singapore Financial Dispute Resolution Scheme. **Hong Kong branch:** A122, 16/F, Tower 5, The Gateway, Harbour City, Tsim Sha Tsui, Kowloon, Hong Kong. Authorised by the Insurance Authority of Hong Kong to conduct long-term insurance business in Hong Kong. **Dubai branch:** PO Box 215113, Unit 706, One Za'abeel - The Offices, Za'abeel Palace Street, Za'abeel First, Dubai, UAE. Registered in the United Arab Emirates (UAE) with the Central Bank of the UAE as an insurance company. Registration date, 18 April 2007 (Registration No. 76). Registered with the Ministry of Economy as a foreign company to conduct life assurance and funds accumulation operations (Registration No. 2013). Friends Provident International is a registered trademark and trading name of Friends Provident International Limited.