

Application Form

Regular payment increase/Additional single payment

Failure to disclose relevant information may delay the processing of your application

Please complete this Application Form in English

Financial adviser details

Product name	<input type="text"/>
Plan number	<input type="text"/>
Additional information	<input type="text"/>
Adviser name	<input type="text"/>
Company name	<input type="text"/>
Friends Provident International agency number	<input type="text"/>
Telephone number	<input type="text"/>
Email address	<input type="text"/>

Details of Policy/Contract holder(s)

	First (or only) Policy/Contract holder	Second Policy/Contract holder
1 Title	Mr <input type="checkbox"/> Mrs <input type="checkbox"/> Miss <input type="checkbox"/> Ms <input type="checkbox"/>	Mr <input type="checkbox"/> Mrs <input type="checkbox"/> Miss <input type="checkbox"/> Ms <input type="checkbox"/>
	Other <input type="text"/>	Other <input type="text"/>
2 Name(s) (as shown on ID Card/Passport)		
Surname	<input type="text"/>	<input type="text"/>
First name(s)	<input type="text"/>	<input type="text"/>

Details of Policy/Contract holder(s)

	First (or only) Policy/Contract holder	Second Policy/Contract holder
3 Residential address	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>
Telephone number	<input type="text"/>	<input type="text"/>
Email address	<input type="text"/> <input type="text"/>	<input type="text"/> <input type="text"/>
4 How long have you lived at this address?	<input type="text"/>	<input type="text"/>
5 Correspondence address (if different to residential address)	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>
Correspondence address telephone number	<input type="text"/>	<input type="text"/>

Payment

Current regular payment amount	<input type="text"/>
New regular payment amount	<input type="text"/>
Additional single payment amount	<input type="text"/>
Effective date (DD/MM/YYYY)	<input type="text"/>

Important notes

1. Please see your product brochure and policy/contract conditions for the minimum increase payment amounts and currency options.
2. The frequency of payment must match the original payment frequency.
3. Please leave at least one month between the date of notification and the effective date to allow new payment arrangements to be processed.
4. Regular payment increases can only take effect on the next regular payment due date. For example if you pay annually, on the date of your next annual payment.

Source of Wealth

Please refer to our website at www.fpinternational.com/knowledge/document-library/ for the evidential requirements to support Source of Wealth.

<input type="checkbox"/>	Savings from salary (basic and/or bonus)	Current annual salary	Currency	<input type="text"/>	Amount	<input type="text"/>
		Employer's name	<input type="text"/>			
		Employer's address	<input type="text"/>			
<input type="checkbox"/>	Pension provision by employer	Employer's name	<input type="text"/>			
		Employer's address	<input type="text"/>			

Please provide the employer's Letter of Confirmation and Certificate of Incorporation.

<input type="checkbox"/>	Other regular income	Amount of income	Currency	<input type="text"/>	Amount	<input type="text"/>
		Details, i.e. name of payer, frequency of payment, reason for payment, etc.	<input type="text"/>			
<input type="checkbox"/>	Regular savings from company profits	Amount of annual profit	Currency	<input type="text"/>	Amount	<input type="text"/>
		Company name	<input type="text"/>			
		Company address	<input type="text"/>			
		Nature of company business	<input type="text"/>			
<input type="checkbox"/>	Other Source of Wealth	<input type="text" value="Please provide as much detail as possible"/>				

Declaration of trust

I/We declare that this Application was signed in (country)

and the advice was given in (country)

I/We further declare that all the information provided in this form, including this Declaration, are complete and true to the best of my/our knowledge and belief.

Signature(s)

First (or only) Policy/Contract holder

Signature
Date (dd/mm/yyyy)

Second Policy/Contract holder

Signature
Date (dd/mm/yyyy)

Important Information

The information given in this document is based on Friends Provident International Limited's understanding of current law and taxation practice which may change in the future. No liability can be accepted for any personal tax consequences of this scheme or for the effect of future tax changes or legislative changes.

Investment involves risk. Fund prices may go up and down depending upon underlying investment performance, and the value of your investment cannot be guaranteed. Investments held within a fund may not be denominated in the currency of that fund and the value of those assets can go up and down simply because of movements in currency exchange rates. We recommend that you discuss specific risks associated with individual investments with your financial adviser before making investment decisions.

All policyholders/contractholders are protected by the Life Assurance (Compensation of Policyholders) Regulation 1991 of the Isle of Man, wherever their place of residence.

Investors should be aware that specific investor protection and compensation schemes that may exist in relation to collective investments and deposit accounts are unlikely to apply in the event of failure of such an investment held within insurance contracts.

Complaints we cannot settle can be referred to the Financial Services Ombudsman Scheme for the Isle of Man.

Some telephone communications with the Company are recorded and may be randomly monitored or interrupted.

Data Privacy

We take the responsibility of handling your personal data very seriously and we will only ask you for details required to process your requests to us. Please be aware of our privacy policy – please visit www.fpinternational.com/legal/privacy-and-cookies to view the full policy or this can be provided on request from our Data Protection Officer.

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