Friends Provident International

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

1 Company name

2 Friends Provident International agency number

Contact details for acknowledgment/queries on the application

3 Title Mr ☐ Mrs ☐ Miss ☐ Ms ☐

4 Surname

5 Forename(s)

6 Telephone number

7 Email address

Details of Policyholder(s)

1 Plan name

2 Policy number

		First (or only) Policyholder	Second Policyholder
3	Title	Mr ☐ Mrs ☐ Miss ☐ Ms ☐	Mr ☐ Mrs ☐ Miss ☐ Ms ☐
4	Surname (as shown on passport/ID card)		
5	Forename(s) (as shown on passport/ID card)		
6	Country of residence for tax purposes		
7	Tax Identification Number (TIN)? If unavailable, provide a functional equivalent (e.g. National Insurance Number, Social Security Number, Resident Registration Number).		
8	Are you a Specified US Person?	Yes ☐ No ☐	Yes ☐ No ☐

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.

If you choose Yes to being a Specified US Person, you will need to provide us with your US Taxpayer Identification Number (TIN) or US Social Security Number (SSN).

If you choose No but you have a US residential/correspondence address, hold a US Passport, a US Green Card or you were born in the US, you will need to provide us with documentary evidence that you are in the process of or have renounced your US Citizenship. FPI can accept a certified copy of your DS-4083 form (also known as CLN – Certificate of Loss of Nationality) and/or a certified copy of your passport for the country in which you have obtained new citizenship.

Details of Policyholder(s) (continued)

		First (or only) Policyholder	Second Policyholder
9	Do you want to update your contact/ address details as part of this application?	Yes ☐ No ☐	Yes ☐ No ☐

For of residential address, please also enclose a clear certified copy of the address proof dated no more than 6 months old.

Please provide new details		

Payment

Currency	Current regular payment amount	Currency	New regular payment amount	Currency	Additional single payment amount

Effective date (MM/YYYY)

Minimum premium increase				
Policy currency	**Monthly**	**Quarterly**	**Half-Yearly**	**Yearly**
USD	50	150	300	600
GBP	33	100	200	400
EUR	50	150	300	600
HKD	400	1,200	2,400	4,800

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.

Payment methods

If you are increasing a regular payment please cancel the existing payment arrangement and set up a replacement payment method for the total amount. Blank payment forms are available to download at www.fpinternational.com/knowledge/document-library/

Choice of mirror funds

Please leave this section blank if you wish your existing fund choice to remain unchanged. If you want to change your fund choice please indicate the funds in which you wish to invest, up to a maximum of 10, showing the percentage of each investible payment. The total percentage must add up to 100% (please note we can only accept whole percentages).

Please note that the whole payment will be applied to your plan based on this fund choice, not just the increased amount.

Fund code	Mirror fund	% of payment
		Total 100%

Source of funds

SOURCE OF FUNDS DETAILS

The Isle of Man Financial Services Authority requires all Isle of Man life companies to make enquiries as to how an applicant has acquired the monies to be used as payment for their plan. 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.

Friends Provident International has adopted a risk-based approach to meet these regulations, categorising our products and countries that we will accept business from into Standard or Higher risk. We have categorised countries according to their level of compliance with international regulatory standards.

Full details on the source of funds procedures can be obtained from your financial adviser or can be downloaded from https://advisers.fpinternational.com/documents/source-of-funds.pdf

You must complete the following questions below in all cases and for both policyholders as applicable.

	Policyholder 1	**Policyholder 2**
Annual salary plus bonuses		
1 Annual salary this year (include currency)		
2 Bonuses this year (include currency)		
3 Annual income last year (include currency)		
4 Bonuses last year (include currency)		
5 Occupation		
6 Employer's company name		
7 Nature of business		

Source of funds (continued)

Other unearned income

7 Amount received (include currency)

8 Received from

9 Date received (DD/MM/YYYY)

If you intend to fund your plan from another source, please indicate which one from the list below for each policyholder and provide the relevant information in the additional information box.

Source of funds	Policyholder 1	Policyholder 2	Information required
Savings	☐	☐	Amount* | Bank where savings held | How and over how long were savings accumulated?
Property of sale	☐	☐	Amount* | Address of property | How long held | Date of sale
Sale of assets	☐	☐	Amount* | Asset type | How long held | Date of sale
Company profits	☐	☐	Profits this year* | Profits last year* |Company name and industry
Company sale	☐	☐	Amount* | Company name and industry | Date of sale
Maturing investment	☐	☐	Amount* | From which company | Date of sale
Lottery / betting / casino	☐	☐	Amount* | Source of win | Date received
Compensation payment	☐	☐	Amount* | Reason for payment | Date received
Gift or inheritance	☐	☐	Amount* | Relationship to benefactor | Reason for gift | Date received
Other	☐	☐	Amount* | Reason for payment | Date received

***Please include currency**

Friends Provident reserves the right to request further documentary evidence of source of funds should it be considered necessary.

Additional information

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.

	First (or only) Policyholder	Second Policyholder
Signature(s)		
Date (DD/MM/YYYY)		

Further 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.

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.

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