

General Investment Account in an Offshore Bond Application Form

Thank you for your interest in holding a General Investment Account (GIA) in an Offshore Bond. Before you fill out this form, please make sure you've read and understood your Offshore Bond Key Features Document. Once you've decided it's the right product for you, please complete all sections.

Personal details

Applicant one

| | |
|-------------------------------|--|
| Forename(s) in full | <input type="text"/> |
| Surname | <input type="text"/> |
| Date of birth (dd/mm/yyyy) | <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> |
| Client number (if known) | <input type="text"/> |

Applicant two (optional)

| | |
|-------------------------------|---|
| Forename(s) in full | <input type="text"/> |
| Surname | <input type="text"/> |
| Date of birth (dd/mm/yyyy) | <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> |
| Client number (if known) | <input type="text"/> |

General Investment Account in an Offshore Bond application

Before you fill out this section, please make sure you've read and understood the Offshore Bond provider's Key Features and Terms and Conditions. Once you've decided it's the right Product for you, please complete all sections.

I wish to apply to hold a General Investment Account in an Offshore Bond on the Wealthtime Classic platform.

Please note that you need to have set up an account with your chosen Offshore Bond provider initially.

Is this Offshore Bond set up in joint names? Yes No If yes, please ask the other bond holder to complete a General Investment Account in an Offshore Bond application form.

Please indicate which provider's Offshore Bond you would like to hold in your Wrap.

Canada Life International (Isle of Man) Utmost International (formerly Quilter International) Utmost Wealth

Policy number

Declaration

I/We acknowledge and accept the Wealthtime Classic GIA in an Offshore Bond Key Features and Wealthtime Classic Terms and Conditions (in addition to the Offshore Bond provider's Key Features and Terms and Conditions). I/We understand that the services provided don't constitute financial advice under the terms of the Financial Services and Markets Act 2000.

| | | | |
|-----------------------------------|---|-----------------------------------|---|
| Your signature (applicant one) | <input type="text"/> | Your signature (applicant two) | <input type="text"/> |
| Full name | <input type="text"/> | Full name | <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"/> <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"/> <input type="text"/> <input type="text"/> |

If you require this document in an alternative format please contact us.