

Monument International Portfolio Bond Adviser authority

Post to Monument Life Insurance dac, Regus Manchester Business Park, 3000 Aviator Way, Manchester, M22 5TG, UK.

Plan number

This adviser authority is for this plan only. A separate authority is required in respect of each plan you have with Monument.

Complete this adviser authority if you want to give authority to your adviser to provide information and/or instructions to Monument.

I/We hereby authorise the adviser firm detailed below to act on my/our behalf in relation to the matters indicated below and to provide information and/or instructions to Monument.

I/We understand that this authority can be withdrawn at any time by written notification to Monument and that until such notification is received, Monument is entitled to rely on this authority and act on any information and/or instructions received from the adviser firm detailed over the page as if they were given directly by me/us.

I/We understand that Monument will not be responsible for the actions or decisions taken by the adviser in connection with my/our plan.

By signing this authority I/we authorise Monument to accept instructions from the adviser firm detailed over the page relating to any of the following, on the condition that any payments are made to the planholder(s), settlor(s)/donor(s) or trust beneficiaries (as applicable):

- Start, amend and/or stop regular withdrawals from the plan;
- Change details of the bank account into which regular withdrawals are paid;
- One-off withdrawal or full cash-in; and
- Buy and sell assets.

Monument reserve the right to amend this list in which case Monument will require a new adviser authority from you.

First planholder/authorised signatory	Second planholder/authorised signatory
Name	Name
Signature	Signature
Day Month Year Date	Day Month Year Date
Third planholder/authorised signatory	Fourth planholder/authorised signatory
Third planholder/authorised signatory Name	Fourth planholder/authorised signatory Name

If there are more than four planholders/ authorised signatories, please complete their details on a separate adviser authority and ensure it is returned with this form.

The adviser firm:

I/We confirm that I/we will act only in accordance with complete instructions from the planholder(s) of the plan, after ensuring the planholder(s) has/have received the key features document and the terms and conditions and in accordance with the permissions and authority granted by the Financial Services and Markets Act 2000 or any replacement legislation.

Adviser firm name	
Adviser firm address	
Postcode Country	
Adviser name	Monument agency account number
Adviser signature (on behalf of the adviser firm)	Day Month Year Date

The Monument International Portfolio Bond is provided by Monument Life Insurance dac.

Monument Life Insurance dac is regulated by the Central Bank of Ireland and subject to limited regulation by the Financial Conduct Authority and the Prudential Regulation Authority. Registered office: 2 Park Place, Ground Floor, Upper Hatch Street, Dublin 2, Ireland. Registered in Ireland under company number 325795. Telephone number 0370 850 6130.

