



Beneficiary Nomination

Investment Portfolio
Investment Portfolio+

JULY 2021

PLEASE NOTE that this form is for natural persons only; trustees and corporates are not able to nominate Beneficiaries.

Beneficiary Nomination – Where Contract Holders wish to transfer the ownership of the Contract on the death of the Relevant Contract Holder and this does not bring the Contract to an end.

We recommend that you consult your legal and financial adviser to ensure that this Nomination request is suitable for your needs.

1 INVESTMENT PORTFOLIO OR INVESTMENT PORTFOLIO+

Contract number

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(The Nomination must apply to all Contracts within the Investment Portfolio or Investment Portfolio+)

2 CONTRACT HOLDER(S)

	FIRST CONTRACT HOLDER	SECOND CONTRACT HOLDER (if any)
Title (✓)	<input type="radio"/> Mr <input type="radio"/> Mrs <input type="radio"/> Miss	<input type="radio"/> Mr <input type="radio"/> Mrs <input type="radio"/> Miss
	<input type="radio"/> Other:	<input type="radio"/> Other:
Full forename(s)		
Surname		
Maiden/Previous name		
Residential address		
Stand/Plot/Erf number		
Country		
Postcode		
Telephone/Cell number		
E-mail address		
Correspondence address		
Country		
Postcode		

If there are additional Contract Holders, please photocopy Page 1 and attach the details to this form and tick here (✓) ☐



3 DEFINITIONS

All terms and expressions used in the Investment Portfolio or Investment Portfolio+ General Conditions shall have the same meaning and effect when used in this form and shall apply to this Nomination.

All terms and expressions which are not defined in the Investment Portfolio or Investment Portfolio+ General Conditions are defined below:

Beneficiary	The person(s), corporation or trustee identified in section 4.
Relevant Contract Holder	The Contract Holder or, where there are two Contract Holders, the last of them to die.
Transfer Date	The date of death of the Relevant Contract Holder, provided this occurs before the Investment Portfolio or Investment Portfolio+ comes to an end by way of the total encashment or maturity of the Investment Portfolio or Investment Portfolio+.

The singular includes the plural, the masculine includes the feminine and vice versa, unless the context infers otherwise.

4 BENEFICIARIES

Listed below are the Beneficiaries who will be entitled to the Investment Portfolio or Investment Portfolio+ and benefits arising on the Transfer Date. Where the Beneficiary is either a corporation or a trust, additional information may be required. For example, where the Beneficiary is a corporation, Old Mutual Isle of Man will require the company registration number.

PRIMARY BENEFICIARIES

Please note all the below information is required and the form cannot be processed without the information.

Full names and Previous / Maiden name	Share (%)	Date of birth (for Trust and Corporate see Notes on page 5)	Relationship to Contract Holder	Current Residential Address (Please include country and post code) and Email Address
1.				
2.				
3.				
4.				
5.				
6.				
Total must equal	100%			

On the Transfer Date, the Investment Portfolio or Investment Portfolio+ and all benefits and rights attached to it shall be transferred to the Primary Beneficiaries in the proportions indicated. If one or more of the Primary Beneficiaries does not survive the Transfer Date, their share(s) shall be distributed between the Primary Beneficiaries alive on the Transfer Date and, if more than one, on a pro rata basis.

If no Primary Beneficiaries survive the Transfer Date, the Investment Portfolio or Investment Portfolio+ and all benefits and rights attached to it, shall be transferred to the Secondary Beneficiaries in the share(s) indicated.



SECONDARY BENEFICIARIES

Full names and Previous / Maiden name	Share (%)	Date of birth (for Trust and Corporate see Notes on page 5)	Relationship to Contract Holder	Current Residential Address (Please include country and post code) and Email Address
1.				
2.				
3.				
4.				
5.				
6.				
Total must equal	100%			

If, on the Transfer Date, there are (i) no Primary or Secondary Beneficiaries then living, or (ii) who, if then living disclaimed in writing their interest in the Investment Portfolio or Investment Portfolio+, then the Investment Portfolio or Investment Portfolio+ and all benefits and rights attached to it shall be transferred to the Contract Holder or the deceased Contract Holder's estate.

5 GENERAL NOMINATION PROVISIONS

- (a) The purpose of the Nomination is to transfer ownership of the Investment Portfolio or Investment Portfolio+ to the Beneficiaries on the death of the Relevant Contract Holder.
- (b) Old Mutual Isle of Man reserves the right to refuse a proposed Nomination in respect of an Investment Portfolio or Investment Portfolio+ or cancel a Nomination.
- (c) The Nomination will only be valid if the Nomination document is received at our Isle of Man Office before the Transfer Date.
- (d) A Nomination will not confer any rights or benefits on the Beneficiaries until the Transfer Date.
- (e) Subject to the provisions contained within this Nomination, the Nomination is intended to benefit any Beneficiary and shall be enforceable to that extent under the Isle of Man Contracts (Rights of Third Parties) Act 2001 (as amended or replaced from time to time).

6 REVOCATION OF THE NOMINATION BEFORE THE TRANSFER DATE

- (a) The Nomination may be revoked by the Contract Holder at any time.
- (b) Any revocation of a Nomination must be made in writing by:
 - (i) the Contract Holder, where there is only one;
 - (ii) both Contract Holders jointly, where there are two;
 - (iii) the surviving Contract Holder following the death of the first to die.



- (c) Any assignment or new Nomination received and accepted by us will automatically revoke any existing Nomination on the Investment Portfolio or Investment Portfolio+.
- (d) The total surrender or Maturity of the Investment Portfolio or Investment Portfolio+ before the Transfer Date will revoke any Nomination in respect of the Investment Portfolio or Investment Portfolio+.
- (e) Any revocation of a Nomination will only apply to the Investment Portfolio or Investment Portfolio+ if it is received by us at our Isle of Man Office before the Transfer Date.

7 THE TRANSFER OF OWNERSHIP ON THE TRANSFER DATE

- (a) On the Transfer Date all legal and beneficial interest in the Investment Portfolio or Investment Portfolio+ will accrue to the Beneficiaries in the manner specified in the Nomination.
- (b) Old Mutual Isle of Man shall not be under any obligation to determine whether the law governing the distribution of assets belonging to the Contract Holder or joint Contract Holders restricts or prohibits a Nomination and the discharge in section 8(b) below will apply notwithstanding any such restriction or prohibition.

8 INVESTMENT PORTFOLIO OR INVESTMENT PORTFOLIO+ CONTRACT TRANSACTIONS AFTER THE TRANSFER DATE

- (a) The Nomination may include provisions authorising a person to act on behalf of one or more or all of the Beneficiaries for the purpose of requesting benefit payments or other transactions in respect of nominated Investment Portfolio or Investment Portfolio+ Accounts following the Transfer Date.
- (b) Old Mutual Isle of Man reserves the right to defer benefit payments or other transactions requested by a Beneficiary under 18 until a parent or guardian of the Beneficiary or a person with authority to act on behalf of the Beneficiary authorises the transaction concerned.
- (c) Old Mutual Isle of Man reserves the right to request evidence, satisfactory to us, of a person's authority to act on behalf of a Beneficiary and transactions requested by such a person may be deferred until such evidence is received.
- (d) Benefit payments or other transactions effected on or after the Transfer Date under the Investment Portfolio or Investment Portfolio+ at the request of or on behalf of the Beneficiaries will discharge Old Mutual Isle of Man from all liabilities and claims in respect of the transactions concerned.

9 ASSIGNMENT OF AN INVESTMENT PORTFOLIO OR INVESTMENT PORTFOLIO+

- (a) A Nomination will not in any way restrict the right of the Contract Holder or joint Contract Holders to assign their legal or beneficial ownership of an Investment Portfolio or Investment Portfolio+ or grant a person a right or interest in the Investment Portfolio or Investment Portfolio+ by way of a charge (for example, a Security Cession) over the Investment Portfolio or Investment Portfolio+.
- (b) An assignment or charge granting a person 'the Assignee' a right or interest of any kind in the Investment Portfolio or Investment Portfolio+ before the Transfer Date will invalidate any Nomination in respect of that Investment Portfolio or Investment Portfolio+. In accordance with the General Conditions governing the Investment Portfolio or Investment Portfolio+, Old Mutual Isle of Man must be notified at its Isle of Man Office so the fact can be registered that the Nomination no longer applies.
- (c) The Investment Portfolio or Investment Portfolio+ is not subject to any assignments, pledges, undertakings or charges of any kind to a bank or any other person and I am therefore entitled to request that this Nomination be added to my Investment Portfolio or Investment Portfolio+.
- (d) There is no bankruptcy order against me (nor is any such order anticipated) and the Investment Portfolio or Investment Portfolio+ is not vested in a trustee in bankruptcy.
- (e) I acknowledge and understand the recommendation from Old Mutual Isle of Man that I take legal advice to ensure that this Nomination satisfies my requirements.
- (f) Old Mutual Isle of Man will not be under any obligation to determine whether the law governing the distribution of assets belonging to me at death restricts or prohibits a Nomination.



SIGNATURE(S) OF CONTRACT HOLDER(S)

I hereby confirm that none of my / our personal particulars, tax information or other details have changed from the information previously provided to Old Mutual Isle of Man other than as indicated on the form. I further confirm that I / we will advise Old Mutual Isle of Man in writing should any information change in the future.

I understand that Old Mutual Isle of Man will be relying on the validity of this information for the purposes of complying with both local and foreign regulations, including, but not limited to, Anti-Money Laundering, FATCA/CRS and Dividend Withholding Tax regulatory requirements.

Signature of first or sole Contract Holder	<input type="text"/>	Date	<input type="text" value="D"/> <input type="text" value="D"/> <input type="text" value="M"/> <input type="text" value="M"/> <input type="text" value="Y"/> <input type="text" value="Y"/> <input type="text" value="Y"/> <input type="text" value="Y"/>
Signature of second Contract Holder (if any)	<input type="text"/>	Date	<input type="text" value="D"/> <input type="text" value="D"/> <input type="text" value="M"/> <input type="text" value="M"/> <input type="text" value="Y"/> <input type="text" value="Y"/> <input type="text" value="Y"/> <input type="text" value="Y"/>
Signature of additional Contract Holder (if any)	<input type="text"/>	Date	<input type="text" value="D"/> <input type="text" value="D"/> <input type="text" value="M"/> <input type="text" value="M"/> <input type="text" value="Y"/> <input type="text" value="Y"/> <input type="text" value="Y"/> <input type="text" value="Y"/>
Signature of additional Contract Holder (if any)	<input type="text"/>	Date	<input type="text" value="D"/> <input type="text" value="D"/> <input type="text" value="M"/> <input type="text" value="M"/> <input type="text" value="Y"/> <input type="text" value="Y"/> <input type="text" value="Y"/> <input type="text" value="Y"/>
Signature of additional Contract Holder (if any)	<input type="text"/>	Date	<input type="text" value="D"/> <input type="text" value="D"/> <input type="text" value="M"/> <input type="text" value="M"/> <input type="text" value="Y"/> <input type="text" value="Y"/> <input type="text" value="Y"/> <input type="text" value="Y"/>
Signature of additional Contract Holder (if any)	<input type="text"/>	Date	<input type="text" value="D"/> <input type="text" value="D"/> <input type="text" value="M"/> <input type="text" value="M"/> <input type="text" value="Y"/> <input type="text" value="Y"/> <input type="text" value="Y"/> <input type="text" value="Y"/>

NOTES

- This Nomination request ('the Nomination') is recommended for cases with up to two Contract Holders.
- This form should be completed to name the Beneficiaries to whom Old Mutual Isle of Man should transfer the ownership of the Investment Portfolio or Investment Portfolio+ on the Transfer Date.
- You can only make a Nomination in respect of the Investment Portfolio or Investment Portfolio+ if you are currently a Contract Holder.
- You cannot create a Nomination if a third party has an interest of any kind in the Investment Portfolio or Investment Portfolio+. For example, you cannot create a Nomination if the Investment Portfolio or Investment Portfolio+ is held by a bank as security for a loan, subject to a Security Cession, or if it is held in trust.
- Secondary Beneficiaries are beneficiaries who will benefit where there are no Primary Beneficiaries.
- Where the Primary or Secondary Beneficiary is a Trust, the following details are required: Trust Name, Trust Date, Trustee Correspondence Address.
- Where the Primary or Secondary Beneficiary is a Corporate, the following details are required: Company Name, Company Registered Number, Company Registered Address.
- Spouses married in Community of Property – in terms of the Matrimonial Property Act, written consent is needed from your spouse to nominate a Beneficiary other than your spouse. If you do not obtain your spouse's written consent, he or she may be entitled to claim an adjustment from you if your joint estate is divided.
- Old Mutual Life Assurance Company South Africa (OMLACSA) has provided details of all our Privacy Notices to you via our literature and General terms and conditions. Our full Privacy Policy can be viewed at www.omi-int.com/privacyPolicy.html or can be obtained by requesting a copy from our Data Protection Officer at enquiries@impactiom.com



Old Mutual International (OMI) Service Support –
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www.omi-int.com

Old Mutual Isle of Man, Branch of Old Mutual Life Assurance Company (South Africa) Limited, is registered in the Isle of Man under number 005664F and whose principal place of business is 5A Village Walk, Onchan, Isle of Man, IM3 4EA, British Isles.

Permitted to carry on long-term Insurance Business in and from the Isle of Man by the Isle of Man Financial Services Authority.

Old Mutual Life Assurance Company (South Africa) Limited, Registration Number 1999/004643/06. A licensed FSP and Life Insurer. Registered office: Mutual Park, Jan Smuts Drive, Pinelands, Cape Town, South Africa.

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