Change of Financial Adviser

Investment Portfolio
Investment Portfolio+

2022

PLEASE USE BLOCK CAPITALS and black or blue ink only, and complete all sections. Please do not use correction fluid; any amendments should be crossed out and signed and dated by all Contract Holders.

To be completed by all Contract Holders.

NOTE: If you want to change or appoint a Fund Adviser, also known as a Discretionary Investment Manager, please use the Change of Discretionary Investment Manager form.

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

TO: OLD MUTUAL ISLE OF MAN

Contract number

I/We wish to remove the following as my/our financial adviser. Correspondence or information in respect of my/our Contract should no longer be provided to this financial adviser. Any remaining commission relating to advice initially received will remain with the original financial adviser. However, any Investment Review Fee to the original financial adviser, if applicable, will cease.

Name of current financial adviser to be removed ______________________________

I/We wish to appoint the following as my/our financial adviser. You may provide, by electronic or other means, information or copy documentation in respect of my/our Contract, to this financial adviser upon the request of this financial adviser.

Adviser code

Financial Adviser company name

Financial Adviser email address

Name of new financial adviser

Telephone / Cell number

Address of financial adviser

Postcode

FAIS licence number

Categories of FAIS licence held

I/We request that an Investment Review Fee is paid to my new financial adviser for ongoing services provided, based on:

- The review date (as agreed between you and your financial adviser) starting on: D D M M Y Y Y Y
- Annual Investment Review Fee of*: % (VAT will automatically be added if applicable.)
- Payment will be payable quarterly.

* Subject to a maximum equivalent of 1% per annum (VAT will automatically be added if applicable.) and minimum payment of £500 for Investment Portfolio and £250 for Investment Portfolio+ per payment. This will be paid by partial encashment of Contracts. For further details, please consult the General Conditions.

Change of Financial Adviser

Full name	Signature

Capacity (√) ◯ Contract Holder ◯ Trustee ◯ Other ______ Date D D M M Y Y Y Y

Full name	Signature

Capacity (√) ◯ Contract Holder ◯ Trustee ◯ Other ______ Date D D M M Y Y Y Y

Full name	Signature

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Full name	Signature

Capacity (√) ◯ Contract Holder ◯ Trustee ◯ Other ______ Date D D M M Y Y Y Y

Full name	Signature

Capacity (√) ◯ Contract Holder ◯ Trustee ◯ Other ______ Date D D M M Y Y Y Y

Full name	Signature

Capacity (√) ◯ Contract Holder ◯ Trustee ◯ Other ______ Date D D M M Y Y Y Y

Old Mutual International (OMI) Advisor Service Support –
Email address: advisor.services@omwealth.co.za

OLD**MUTUAL**

INTERNATIONAL

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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