

Beneficiary access form

Who is this form for?

This form should be used exclusively by corporate pension trustees who would like to provide their clients with online access to information about the offshore bond held within their pension arrangement.

Acceptable pension schemes include, but are not necessarily limited to:

- Qualifying Recognised Overseas Pension Schemes (QROPS)
- Self Invested Personal Pensions (SIPPs)

Completing this form

If you need help completing this form please contact our Customer Services Team on +44 (0)1624 681685 or alternatively you can email websupport@rl360.com.

When you have completed this form

Please send the original signed agreement by post direct to: Web Support Team, RL360°, RL360 House, Cooil Road, Douglas, Isle of Man, IM2 2SP, British Isles.

Company name	<input type="text"/>
Pension scheme name	<input type="text"/>
Policy number	<input type="text"/>

Beneficiary details

	Beneficiary 1	Beneficiary 2
Title (please tick)	Mr <input type="checkbox"/> Mrs <input type="checkbox"/> Miss <input type="checkbox"/>	Mr <input type="checkbox"/> Mrs <input type="checkbox"/> Miss <input type="checkbox"/>
	Other (in full) <input type="text"/>	Other (in full) <input type="text"/>
First name(s)	<input type="text"/>	<input type="text"/>
Last name(s)	<input type="text"/>	<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"/>
Email address	<input type="text"/>	<input type="text"/>
Current residential address (including postcode and country)	<input type="text"/>	<input type="text"/>

Company Director/Partner/Authorised Signatory on behalf of the Master Account Holder

Signed	<input type="text"/>
Full name	<input type="text"/>
Position held	<input type="text"/>
Date (dd/mm/yyyy)	<input type="text"/> <input type="text"/> <input type="text"/>