Section A) Zurich Portfolio nomination

The agreement that Zurich has entered into with Sterling ISA Managers Limited is a wide ranging authority that allows the trading of assets and the provision of custody services or the selection of a custodian.

Sterling ISA Managers Limited details
Sterling ISA Managers Limited. Registered in England and Wales under company number 02395416. Registered Office: The Grange, Bishops Cleeve, Cheltenham, GL52 8XX.
Sterling ISA Managers Limited will arrange for assets to be registered in the name of Sterling ISA Managers (Nominees) Limited.

Declaration
I/We request that Zurich appoint Sterling ISA Managers Limited to make the assets in my/our plan available to manage within a Zurich Portfolio.
I am/We are aware that, where applicable, Zurich will not sell assets in my/our existing plan until Sterling ISA Managers Limited has confirmed they are able to accept the proceeds of my/our plan into the Zurich Portfolio.
I am/We are aware that the assets made available within the Zurich Portfolio will be owned by Zurich.
I am/We are aware that Zurich has entered into an agreement with Sterling ISA Managers Limited that prohibits investing in assets that are not permitted by Zurich.
I am/We are aware that Zurich may need to terminate the agreement it has in place with Sterling ISA Managers Limited and in the event of termination, Zurich will control the assets previously managed within the Zurich Portfolio. This will take place only when all the assets in the Zurich Portfolio have been sold and the proceeds transferred back to Zurich.
I/We acknowledge that I/we may request Zurich to terminate the nomination to have assets managed within a Zurich Portfolio, which, if accepted by Zurich, will take place only when all the assets in the Zurich Portfolio have been sold and the proceeds transferred back to Zurich.
I/We acknowledge that Zurich does not endorse the ability or suitability of any adviser or investment adviser that I/we choose to appoint to manage assets held in a Zurich Portfolio.

Personal details – applicants

How many people are applying for the plan (applicants)?

How many lives insured are there?

First applicant
Is this person also a life insured?

| Yes | No |

Surname

Forename(s)

| Mr | Mrs | Miss | Ms | Dr |

Other (please give details)

Second applicant
Is this person also a life insured?

| Yes | No |

Surname

Forename(s)

| Mr | Mrs | Miss | Ms | Dr |

Other (please give details)
### Section A) Zurich Portfolio nomination (continued)

#### First applicant (continued)

**Contact details**
- **Current residential address**
- **Postcode**
- **Country**
- **Daytime telephone**
- **Mobile telephone**
- **Evening telephone**
- **Email address**

<table>
<thead>
<tr>
<th>Day</th>
<th>Month</th>
<th>Year</th>
</tr>
</thead>
<tbody>
<tr>
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</tbody>
</table>

**Date of birth**

**Sex**
- Female

**Nationality**

**Town/city of birth**

**Country of birth**

**Country of residence for tax purposes**

**Tax reference number (if UK, please supply your national insurance number)**

**Are you a US citizen?**
- Yes
- No

**Normal country of residence**

**Correspondence address (if different to current residential address)**

<table>
<thead>
<tr>
<th>Postcode</th>
<th>Country</th>
<th>Occupation</th>
<th>Income</th>
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</thead>
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</tbody>
</table>

#### Second applicant (continued)

**Contact details**
- **Current residential address**
- **Postcode**
- **Country**
- **Daytime telephone**
- **Mobile telephone**
- **Evening telephone**
- **Email address**

<table>
<thead>
<tr>
<th>Day</th>
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<th>Year</th>
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</thead>
<tbody>
<tr>
<td></td>
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<td></td>
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</tbody>
</table>

**Date of birth**

**Sex**
- Male

**Nationality**

**Town/city of birth**

**Country of birth**

**Country of residence for tax purposes**

**Tax reference number (if UK, please supply your national insurance number)**

**Are you a US citizen?**
- Yes
- No

**Normal country of residence**

**Correspondence address (if different to current residential address)**

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<thead>
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<th>Occupation</th>
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</table>
### Third applicant

**Is this person also a life insured?**

- [ ] Yes  
- [x] No

**Surname**

**Forename(s)**

- [ ] Mr  
- [ ] Mrs  
- [ ] Miss  
- [ ] Ms  
- [ ] Dr  
- [ ] Other (please give details)

**Contact details**

- [ ] Current residential address
- [ ] Postcode
- [ ] Country
- [ ] Daytime telephone
- [ ] Mobile telephone
- [ ] Evening telephone
- [ ] Email address

- Day Month Year

**Date of birth**

- [ ] Male  
- [ ] Female

**Nationality**

**Town/city of birth**

**Country of birth**

**Country of residence for tax purposes**

**Tax reference number (if UK, please supply your national insurance number)**

- Are you a US citizen?  
- [ ] Yes  
- [x] No

**Normal country of residence**

**Correspondence address (if different to current residential address)**

- Postcode
- Country
- Occupation
- Income

### Forth applicant

**Is this person also a life insured?**

- [ ] Yes  
- [x] No

**Surname**

**Forename(s)**

- [ ] Mr  
- [ ] Mrs  
- [ ] Miss  
- [ ] Ms  
- [ ] Dr  
- [ ] Other (please give details)

**Contact details**

- [ ] Current residential address
- [ ] Postcode
- [ ] Country
- [ ] Daytime telephone
- [ ] Mobile telephone
- [ ] Evening telephone
- [ ] Email address

- Day Month Year

**Date of birth**

- [ ] Male  
- [ ] Female

**Nationality**

**Town/city of birth**

**Country of birth**

**Country of residence for tax purposes**

**Tax reference number (if UK, please supply your national insurance number)**

- Are you a US citizen?  
- [ ] Yes  
- [x] No

**Normal country of residence**

**Correspondence address (if different to current residential address)**

- Postcode
- Country
- Occupation
- Income
Section B) Zurich Portfolio disinvestment strategy

You must confirm how you want Sterling ISA Managers Limited to disinvest plan assets to cover charges.

What assets do you want to disinvest first to cover charges?

- Proportionately across all mutual funds as an option
- Least volatile mutual fund
- Most recently purchased mutual fund

If you are investing in specific assets that you want to exclude from the disinvestment strategy, please confirm details of the assets below.

<table>
<thead>
<tr>
<th>Asset name</th>
<th>ISIN Number</th>
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Section C) Regular withdrawals from a Zurich Portfolio

You must complete this section if you want to set up or continue regular withdrawals from your plan.

Instructions given here will replace any existing instructions.

Please confirm the amount of your regular withdrawal: £ each year

Regular withdrawals will be taken equally from all policies. You may have to pay tax if your yearly withdrawals are more than 5% of your total initial payment and any additional payment.

Frequency

How often do you want to receive a withdrawal?

- Every month
- Every three months
- Every six months
- Every year

What date would you like your withdrawals to start?

(This must be at least 30 days after we receive your request)

Day Month Year

What date would you like your withdrawals to end? (optional)

Day Month Year

It may take up to four working days from the date we receive the money from Sterling ISA Managers Limited for the payment to reach your account.

If you don’t specify a date, the first withdrawal will be made on the next available withdrawal date after the start date of the plan. This must be at least 30 days after the start date of the plan.

For example, if your plan starts on 1 June and you have asked for monthly withdrawals, the first withdrawal will be made on 1 July. If you have asked for withdrawals to be made every six months, the first withdrawal will be made on 1 December and if you have asked for yearly withdrawals, the first withdrawal will be made on the next 1 June.

Please refer to the information leaflet for details of the minimum regular withdrawal amount and minimum plan value.

The maximum regular withdrawal is 7.5% of the plan value each year.
Section C) Regular withdrawals from a Zurich Portfolio (continued)

Income payment strategy
To take regular withdrawals, please confirm what assets you want Sterling ISA Managers Limited to sell to fund the withdrawals you are requesting.

- I want to take the withdrawals proportionately across all mutual fund assets held in the Zurich Portfolio.
- I want to take the withdrawals from the assets specified in the table below.

Withdrawal payment details

<table>
<thead>
<tr>
<th>Asset name</th>
<th>ISIN Number</th>
<th>Withdrawal to be taken from asset (%)</th>
</tr>
</thead>
</table>

Please select one option.

If you specify for a withdrawal to be taken in whole or in part from a model portfolio, the amount will be taken proportionately from each asset within it and you do not need to specify each individual asset.

A confirmation of verification of identity (see section 17) will need to be completed if the account holder is not an applicant.

Name of account holder

Name of bank/building society

Account number

Country account is based in

Account branch name

Account branch address

Postcode

Country

Sort code

Roll number
The Zurich International Portfolio Bond is provided by Zurich Life Assurance plc.
Zurich Life Assurance plc is authorised and regulated by the Central Bank of Ireland and subject to limited regulation by the Financial Conduct Authority for the conduct of insurance business in the UK. Registered office: Zurich House, Frascati Road, Blackrock, Co Dublin, Ireland. Registered in Ireland under company number 58098. Telephone number 0870 850 6130.
We may record or monitor calls to improve our service.