



STERLING

Investment Bond adviser remuneration application form

Adviser remuneration

Adviser remuneration can only be selected for investment bonds where the initial payment was £50,000 and above.

Only complete this application form if you wish to change the existing ongoing adviser remuneration basis, set up a new ongoing adviser remuneration basis, or request a one off payment. This will replace any existing instructions to deduct ongoing adviser remuneration.

This adviser remuneration application form is for this investment bond only. A separate form is required in respect of each investment bond.

Investment bond number

Ongoing adviser remuneration

Either % each year of the bond value.

If you wish to deduct ongoing adviser remuneration as a percentage of the original investment, please convert to a monetary amount and enter in the box below.

Or £ each year.

How often do you want your adviser to receive ongoing adviser remuneration payments?

Every three months ☐ Every six months ☐ Once a year ☐

One off adviser remuneration

Either % of the bond value.

Or £

You may have to pay tax if the total of all regular withdrawals and any one off and ongoing adviser remuneration payments are more than 5% each year of the amounts invested into your bond. Please speak to your adviser for more information including the affect of any one off withdrawals you may have taken.

Financial Adviser Name

To be completed by the Adviser

Adviser details

Adviser name

Adviser firm

Adviser address

FCA code

E-mail address

Mobile telephone number

Sterling agency code

Declaration

- I/We instruct Sterling to deduct the one off and/or ongoing adviser remuneration detailed in this application from the investment bond and pay it to my/our adviser.
- I/We understand that I/we cannot cancel a payment in respect of adviser remuneration once it has been paid or deducted from the investment bond, and that I/we will need to contact my/our adviser to discuss whether a refund is payable in full or in part or not due.

This declaration must be signed by all owners of the investment bond. If the investment bond is held in trust all trustees must sign this declaration.

Please attach an additional sheet if there are more than four owners/trustees.

Owner/Trustee 1

Signature

Date (DD/MM/YYYY)

Print name

Owner/Trustee 2

Signature

Date (DD/MM/YYYY)

Print name

Owner/Trustee 3

Signature

Date (DD/MM/YYYY)

Print name

Owner/Trustee 4

Signature

Date (DD/MM/YYYY)

Print name