

SURRENDER/REDEMPTION REQUEST

The policyholder should complete this form, print, sign and return to us

| | | | |
|--|----------------------|--------------|----------------------|
| First Name | <input type="text"/> | Surname | <input type="text"/> |
| Warrant/Pay Number | <input type="text"/> | Phone number | <input type="text"/> |
| Email | <input type="text"/> | | |
| Policy details to be surrendered or redeemed | <input type="text"/> | | |
| Reason for surrender (optional) | <input type="text"/> | | |

BANK DETAILS FOR PAYMENTS

Note: For Children's Savings Plan cancellations – in all cases a CHEQUE will be sent to the child

| | | | | | | | | |
|---|----------------------|----------------------|----------------------|----------------------|----------------------|----------------------|----------------------|----------------------|
| Account number | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> | |
| Sort code | <input type="text"/> | <input type="text"/> | - | <input type="text"/> | <input type="text"/> | - | <input type="text"/> | <input type="text"/> |
| Account holder's name (same as the policyholder) | <input type="text"/> | | | | | | | |
| Name of Bank or Building Society | <input type="text"/> | | | | | | | |

It is essential that this information is accurate – you may prefer to send us a spare paying-in slip

Please accept this letter as my authority to surrender my plan(s) and make payment into my bank account

| | | | |
|------------------------|----------------------|------|----------------------|
| Policyholder signature | <input type="text"/> | Date | <input type="text"/> |
|------------------------|----------------------|------|----------------------|

OUR DATA PRIVACY STATEMENT – we need the information you provide in order to carry out your instruction. We will share your data with the paying bank and our auditors. Your data may be held for up to six years for audit purposes. For more information please refer to the privacy notice available on our website.

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