



Application Form

Notes to help you

This form should only be used for applications for International Prudence Bond issued by Prudential International Assurance plc.

This form is divided into sections. **Notes** are provided at the end of each section to help you to complete the section.

All documents, correspondence and communication will be in English.

If you have any queries while completing this application please speak to your financial adviser.

Please use black ink and write in CAPITAL LETTERS or tick as appropriate. Any corrections must be initialled – do not use correction fluid as this will invalidate your application.

Please send the completed form to **Prudential International, Stirling, FK9 4UE, United Kingdom.**

A checklist is provided below to help ensure that all relevant sections have been completed. Failure to provide all relevant information will delay the processing of this application.

Please read the Key Features booklet and the PruFund Range of Funds: Guarantee options before completing this application.

Applicant checklist

Section 1 – has been completed.

Section 1 – Tax Residency questions have been answered in full.

Section 2 – has been fully completed. Part A & B are required under Money Laundering Requirements.

Section 5 – has been completed if regular withdrawals are required.

Section 7 – Nomination of beneficiaries section has been completed – optional.

Section 8 – Declaration section has been read and signed.

Section 9 – Declaration of residence outside Ireland has been fully completed and signed.

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Section 1 – Personal details

Notes to help you: Prudential International will take your declared country of tax residence and tax regime¹ for any obligatory tax reporting/paying purposes.

How many applicants are applying for the bond?²

One applicant (Complete Part A only below)

☐

More than one applicant³ (Complete Parts A & B below)

☐

Part A – First (or only) Applicant

Surname

Forenames

Mr ☐ Mrs ☐ Miss ☐ Ms ☐ Other

Address (your habitual residence)

Country

Part B – Further Applicants

Surname

Forenames

Mr ☐ Mrs ☐ Miss ☐ Ms ☐ Other

Address (your habitual residence)

Country

Section 1 – Personal details – continued

Part A – First (or only) Applicant

Correspondence address (if different from above)

Telephone number

E-mail address

Date of birth

D	D	M	M	Y	Y	Y	Y
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Gender Male ☐ Female ☐

Nationality⁵

Profession (if retired also state previous profession)

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If retired how long have you been retired

Job title including industry

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Do you have any policies with Prudential International? Yes ☐ No ☐

Policy number(s)

Please list the country or countries in which you are resident for tax purposes together with any tax Identification Number(s) (TIN), if relevant¹

Country/Countries of tax residence	TIN

For Spanish Tax Residents please indicate which tax regime applies to you⁴

Individual Income Tax (IIT) ☐

or Special Tax Regime (STR) ☐

Residents in the US for tax purposes MUST provide the information requested. If you are a US citizen or hold a US passport or green card, you will also be considered tax resident in the US even if you live outside the US.

Notes

- ¹ If you are unsure of your tax residency status please contact your financial adviser.
- ² Please note we cannot accept an application from anyone who is under 18 years old.
- ³ If there are three or four applicants, please photocopy Section 1, complete and return with this application. If there are two applicants, we will issue the bond in their names as joint owners (in other words, as joint legal owners of the bond).

Part B – Further Applicants

Correspondence address (if different from above)

Telephone number

E-mail address

Date of birth

D	D	M	M	Y	Y	Y	Y
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Gender Male ☐ Female ☐

Nationality⁵

Profession (if retired also state previous profession)

--

If retired how long have you been retired

Job title including industry

--

Do you have any policies with Prudential International? Yes ☐ No ☐

Policy number(s)

Please list the country or countries in which you are resident for tax purposes together with any tax Identification Number(s) (TIN), if relevant¹

Country/Countries of tax residence	TIN

For Spanish Tax Residents please indicate which tax regime applies to you⁴

Individual Income Tax (IIT) ☐

or Special Tax Regime (STR) ☐

Residents in the US for tax purposes MUST provide the information requested. If you are a US citizen or hold a US passport or green card, you will also be considered tax resident in the US even if you live outside the US.

- ⁴ If you are unsure which tax regime applies to you, please speak to your financial adviser. If the Special Tax Regime (STR) applies, please submit a copy of your STR certificate with this application.
- ⁵ If English is not your first language please sign and enclose an English language declaration letter.

Section 2 – Investment details

Part A⁶

Amount of your payment (*min €25,000, £20,000 or \$35,000*)

Please note that interest will not be credited to payments received prior to the receipt of all documentation requirements.

Your payment is being made by:

➤ Bank transfer/telegraphic transfer (*to be remitted by your bank*) ☐

➤ Bankers draft (*payable to Prudential International*) ☐

Please provide details of the account from which the payment has been drawn below. Please note: the source of funds must be an account held in the name of the applicant(s).⁷

Name of bank

Account name

Address

Account number

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Sort code

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IBAN

SWIFT-BIC

Part B – Source of your payment/Origin of wealth⁷

Please complete (i) and (ii) below.

(i) Bank deposit ☐

Borrowings, investment income, sale of property, sale of stockmarket investments (*please specify*)

Other (*please specify*)

(ii) Territory your payment was made from:

Spain ☐

Other EU Country ☐

Other (*please specify*)

Notes

⁶ The maximum total investment across the PruFund Range of Funds (in one or more bonds) is €1,500,000, US\$1,500,000 or £1,000,000. There is no maximum for the other funds.

⁷ If the funds come from a bank account where the applicant is not the sole account holder, we will require personal ID and address verification for all account holders. We may need to request additional information such as proof of the source of wealth and the source of your funds to comply with our legal and regulatory obligations.

Section 3 – Selected currency or currencies

Currency conversion does not take place until the contract issues. There is no guarantee of the conversion rate.

One currency for all aspects^{8a}

Euro € ☐ UK £ ☐ US \$ ☐

OR

Different currencies – all boxes must be completed^{8b}

(a) Limit currency – *The currency we use for charges, minimum and maximum limits and allocation factors.*

Euro € ☐ UK £ ☐ US \$ ☐

(b) Investment currency – *The currency in which you make your payment into the bond.*

Euro € ☐ UK £ ☐ US \$ ☐ Other^{8b}

(c) Cash-In benefit currency – *For payment of any cash-in benefits, including regular withdrawals you may take.*

Euro € ☐ UK £ ☐ US \$ ☐ Other

(d) Death/maturity benefit currency – *For payment of death/maturity benefit.*

Euro € ☐ UK £ ☐ US \$ ☐ Other

Notes

8a Complete if you wish to choose one currency to apply for all aspects of your bond. This does not include fund currency (this will depend on which funds you wish to invest in when completing Section 4).

8b Complete if you wish to select different currencies for different aspects of your bond. If this section is left blank we will assume Euro € for all aspects. All payments from the bond, including any from the PruFund Protected Funds, will be paid in the Cash-In Benefit Currency. The Limit Currency can only be Euro €, UK £ or US \$.

Section 4 – Fund choice^{9, 10}

Important Information

Access to the Prudential PAC Sterling, PAC Euro and PAC US Dollar With-Profits Funds is no longer available to new customers investing in International Prudence Bond (IPB) on or after 11/09/2017.

It is important to note we are not closing the Prudential With-Profits Fund. The underlying fund and ongoing management of the fund will remain the same and access will continue to be available to the With-Profits Fund through the PruFund range of funds.

If you are in any doubt about this product please speak to your Financial Adviser.

Fund name	Fund currency (€ £ \$)	% of your payment into the bond
		Total = 100%

9 Minimum investment in each fund is €750, £500 or US \$750. You can invest in up to five funds. To help make your initial fund choice, please contact your financial adviser.

You can select only one fund from each of these groups: the PruFund Growth Funds, the PruFund Cautious Funds and the PruFund Protected Funds. For example, you cannot invest in the PruFund Growth (Euro) Fund and the PruFund Growth (Sterling) Fund. However, you may choose one fund from each group, in either the same or different currencies.

Investment in any of the PruFund Range of Funds will initially be invested in the PruFund Account(s) corresponding to your chosen fund(s). Your investment will be transferred into your chosen fund(s) at the next available PruFund Quarter Date.

Please refer to "Your guide to investing in the PruFund Range of Funds" for further information.

10 Please refer to "The PruFund Range of Funds: Guarantee options" for the terms currently available and the charges that apply. Failure to provide all relevant information will delay the processing of this application.

Section 5 – Taking regular withdrawals

Please read the Key Features document when completing this section.¹¹

When regular withdrawals start or change, the amount requested during any 12 month period cannot exceed the greater of 5% of the full value of your plan, or if selected at the start of your plan, 5% of the total amount you paid in. Please note any amount you request below will be subject to withholding tax.

Minimum payment €112.50, £75 or US \$112.50.

1. I/We wish to receive every year **or** % of my/our initial investment into the bond every year
or % of the value of my/our bond every year

2. Payable at these intervals Every month ☐ Every three months ☐ Every six months ☐ Every 12 months ☐

NOTE: As Tax may need to be calculated and deducted from any Regular Withdrawal Payment you take, you should select a start date that is at least 10 working days prior to the date you wish to receive it in your Bank Account.

3. Date you wish regular payments to start¹² (must be at least 30 days after the start of your bond)

4. For regular withdrawals it is Prudential International's policy to transfer funds electronically to your bank account. Payments being made to locations outside of Europe and the UK in currencies other than Euro € and UK £ will be made by telegraphic transfer¹³

Name of bank

Account name¹⁴

Address

Account number

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Sort code

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IBAN

SWIFT-BIC

Notes

¹¹ If you have selected a PruFund Protected Fund and wish to take regular withdrawals, the amount guaranteed will be adjusted proportionately for any withdrawals you have made. If you have made two or more investments, we will cancel units in proportion to the value of units in each.

¹² Normally we make the first payment at the end of the period you choose, for example, monthly payments start a month after the bond is set up. Only enter a date if you want your withdrawals to start later.

¹³ Prudential International does not currently charge for payments made by telegraphic transfer but may do so in the future. In addition, banks including the recipient bank may levy further charges.

¹⁴ For all payments by Direct Credit or Telegraphic Transfer, Prudential International requires documentation to verify that the account is held in the name(s) of the policyholder(s). This can be provided by submitting a certified copy of a bank statement, or other suitable document, for the account to which funds are to be sent. We will require certified personal identification and address verification for any joint account holder in order to comply with all legal and regulatory obligations.

Payments cannot be made until full Bank Account verification is received.

Section 6 – Person(s) to be covered by the bond

The bond can be used to cover the lives of up to 10 people

1. Applicant(s) to be covered by the bond: *(please tick)* First (or only) ☐ Applicant 2 ☐ Applicant 3 ☐ Applicant 4 ☐

If more than one person is to be covered by the bond, please state relationship between applicants:

2. If the death benefit is to be payable on first death please tick this box ☐ If selected, a Beneficiary Nomination will not be accepted.

If not ticked, we will assume that the death benefit is to be payable on the death of the last surviving person.

If only the applicant(s) is/are to be covered by the bond, please go to Section 7 (optional) or Section 8.

3. Person(s) to be covered by the Bond who are not Applicants.

If anyone is to be covered by the Bond in addition to or instead of the Applicants, please complete the rest of this Section. Please note that naming a person as a Person to be covered by the Bond does not of itself give that person any financial right or interest in the Bond.

Person to be covered by the bond

Surname

Nationality

Forenames

Address

Mr ☐ Mrs ☐ Miss ☐ Ms ☐ Other

Country

Date of birth

D	D	M	M	Y	Y	Y	Y
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Telephone number

Gender

Male ☐ Female ☐

Relationship to Applicant

Section 6 – Person(s) to be covered by the bond – continued

Other persons to be covered by the bond who are not applicants¹⁵

Surname

Forenames

Mr ☐

Mrs ☐

Miss ☐

Ms ☐

Other ☐

Address

Country

Surname

Forenames

Mr ☐

Mrs ☐

Miss ☐

Ms ☐

Other ☐

Address

Country

Date of birth

D	D	M	M	Y	Y	Y	Y
---	---	---	---	---	---	---	---

Gender

Male ☐

Female ☐

Nationality

Relationship to Applicant

Date of birth

D	D	M	M	Y	Y	Y	Y
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Gender

Male ☐

Female ☐

Nationality

Relationship to Applicant

Each person to be covered must be aged 14 years or over.

Where more than one person is to be covered by the bond and the death benefit is to be payable

- on the first death, all lives to be covered must be under age 90, or
- on the last death, at least one person to be covered must be under age 90.

If you are naming persons to be covered in addition to or instead of the applicant(s), please complete the relationship box as follows:

You can include your family as named lives assured. Please indicate the relationship of each life assured to you, for example "spouse", "son" or "daughter".

Notes

¹⁵ The bond can cover up to 10 persons. If necessary please photocopy this page, complete and send in with this application.

Section 7 – Nomination of beneficiaries – optional

Complete this section if you wish to nominate a beneficiary or beneficiaries.

You may not nominate beneficiaries where the contract is owned by two or more persons and the life cover is written on a Joint Life first death basis.

You are liable to designate that in the event of your death the benefits of the bond are payable to your chosen beneficiary or beneficiaries.

It is the responsibility of the bondholder(s) to ensure that the nomination of a beneficiary(ies) under the form shall be effective under the laws of his or her domicile and/or residence. We recommend that you take independent taxation and legal advice before making any nomination.

In Spain it is usual to nominate beneficiaries by name allocating a percentage based division of the benefits. Please use whole numbers and ensure the total is 100%

I/We nominate the following to receive the benefits of my/our bond in the event of my/our death:

(If necessary please photocopy this page, complete and send in with this application.)

Surname	Forename	Title	Address	Date of birth	Gender M/F	Nationality	Tax number (if known)	% of benefit
				DD/MM/YY				
				DD/MM/YY				
				DD/MM/YY				
				DD/MM/YY				
				DD/MM/YY				
							Total	100%

Notes

Should you wish to avoid delays at claim stage we recommend you supply evidence of identity of named beneficiaries.

Any subsequent nomination shall revoke this nomination and such acceptance shall be endorsed on the bond.

The beneficiaries shall have no right in or to the bond and the bond proceeds until the death of the relevant person(s) covered by the bond.

Provided the bondholder(s) has/have not previously irrevocably nominated a beneficiary or beneficiaries, the bondholder(s) may cancel this nomination without the need to appoint a beneficiary or beneficiaries in substitution or the consent of the beneficiary(ies) by notice in writing reaching the Administration Centre of Prudential International before the death of the relevant person covered by the bond.

This nomination will automatically become null and void in the event of the bond lapsing for any reason.

Unless otherwise agreed in writing, any revival of the Bond after it has lapsed shall have the effect of reviving this nomination if it was effective immediately before the Bond lapsed.

In the event of more than one person being nominated as a beneficiary and any one or more of them dies before the relevant person covered by the bond, his or her share shall accrue to the surviving beneficiary(ies) in proportion to the percentage of benefit on the nomination form.

Prior to paying the death benefit pursuant to a beneficiary nomination. Prudential International require satisfactory documentary evidence (i) of the death and age for the person covered by the bond (each person covered by the bond if two or more persons are covered) and (ii) from each and every beneficiary who is tax resident in Spain when the bond ends demonstrating that any and all liability to Spanish Gift and Inheritance Tax has been duly paid in full.

The receipt by the beneficiary(ies) nominated in a nomination in force at the date of death of the relevant person covered by the bond shall be a good and full discharge for any payment of the proceeds of the bond and Prudential International shall not be concerned to see the application of such monies.

Section 8 – Declaration

1. Confirmation by each Applicant

This Application should be read and the Declaration signed by the person(s) who is/are to own the bond.

You must be aged 18 or over to be the owner of the bond.

I confirm that:

- a) the information given in this Application Form and any schedule or other document relating to this application is true and complete to the best of my knowledge and belief.
- b) I have not concealed or omitted any material facts (and to the best of my knowledge and belief no other person involved in this application has concealed or omitted any material facts).
- c) I will notify you of any material facts I become aware of before the contract starts.
- d) I have read the warning regarding material facts on page 10 and I understand that failure to disclose a material fact may affect entitlement to benefits under the contract and could result in the contract being void.
- e) I have read the appropriate Key Features document and I understand the nature of the contract.
- f) I understand that any additional payments made into the bond will be invested on the same basis as the initial payment.
- g) I understand that a sole applicant, or, if there is more than one applicant, any one of the applicants, has the right to cancel the contract within 30 days of receiving the cancellation notice.
- h) I authorise Prudential International and all other companies in the Prudential Group to provide details of all data (including personal data) disclosed by me in conjunction with my application for a policy, to any regulatory, tax or revenue authority and as otherwise required by law.
- i) I will notify Prudential International if I change my country of tax residence or tax regime or if the rights conferred by the contract are transferred to another individual or body.
- j) as a consequence of my investment and where applicable, I authorise and direct Prudential International to pay on my behalf all taxes, levies and other similar payments payable to my home country's taxation and revenue authorities from the funds from which the bond derives its value, which I acknowledge will result in a corresponding reduction in the value of the bond. I confirm that I have sought taxation advice in the country in which I am resident unless I consider my personal knowledge is such that I do not have to do so.
- k) I understand that a copy of the terms and conditions, and the completed Application Form, are available on request.
- l) I understand calls may be monitored or recorded for quality, staff training, dispute resolution and/or security purposes.
- m) I have read and understood this Application Form and all other documentation provided by Prudential International in relation to my application.

- n) I acknowledge and accept that the validity, construction and performance of any contract entered into between Prudential International and myself shall be governed by Spanish Law and that any dispute arising under or in connection with the contract shall be subject to the exclusive jurisdiction of the Spanish Courts to which I hereby submit.
- o) each person to be covered by the bond consents to this application (and/or the consent of a parent or guardian has been given for any person to be covered by the bond who is under 18 or otherwise lacks legal capacity).
- p) I acknowledge and accept that all documents, correspondence and communication will be in English.

2. Storing and using your information for each applicant

Prudential International Assurance plc is the data controller for the purposes of the Data Protection Acts, 1988 and 2003 (as amended) (Acts). By signing below you indicate your consent to Prudential International Assurance plc and its service provider, Capita Life & Pensions Services (Ireland) Limited which forms part of the Capita Group, companies within the Prudential Group* and its business partners holding, processing and using your information in order to decide upon your application for a life assurance policy (including any renewals or new life assurance products) and for administration, customer services, marketing and profiling your purchasing preferences, management, risk assessment, research and statistical analysis and marketing purposes. For Tax residency and Tax Identification numbers, this information is collected for the sole purpose of sharing with any current or future Inter-governmental agreements required under Irish legislation.

For certain products, we may search the files of credit reference agencies that will record any credit searches on your file. This is to help us make decisions about you, to prevent fraud, to check your identity and to prevent money laundering. We may disclose details of how you conduct your account to such agencies. The information will be used by other credit grantors for making decisions about you and the people with whom you are financially associated, for fraud prevention, money-laundering prevention and occasionally for tracing debtors.

The information may be used to recheck these purposes. We will pass your information to any legal or regulatory body if required to do so.

Prudential International Assurance plc and companies within the Prudential Group* may use your information to inform you (including by telephone) of other products and services offered by them, or, we will not send you any information if the box below is ticked:

I do not wish to be contacted

☐

You have a right to apply for a copy of the information held by us about you (for which a small charge, not exceeding €6.35, may apply) and you have a right to have any inaccuracies in your information corrected. Please send your request in writing to the Data Protection Officer at Prudential International Assurance plc, Montague House, Adelaide Road, Dublin 2, Ireland. We shall respond as soon as reasonably possible and at the latest within 40 days of the date of your request.

Section 8 – Declaration – continued

Prudential International Assurance plc may transfer and disclose your personal information to other companies within the Prudential Group for the purposes above. This may involve the transfer of personal information to countries outside of the European Economic Area, including countries which may not have adequate data protection laws in place. A full list of countries to which your data may be transferred is available to you on request. On transferring personal data, Prudential International Assurance plc will take appropriate measures to ensure the security and integrity of your personal information.

By signing below you further indicate your consent to the transfer of your personal data outside of the European Economic Area for purposes set out above.

To prevent and detect fraud we may share your data with other organisations, including the police, and check and/or file your data with fraud prevention agencies and databases, and if we are given false or inaccurate information and we suspect fraud, we will record this. We may also disclose your information to third parties in order to comply with any legal or regulatory obligation.

From time to time we may survey our customers regarding the level of our service. Please tick here if you do not wish to be included in any future survey.

☐

If you provide us with information of any other person, you confirm that they consent to the processing of their personal information in the manner set out above and that you have fully informed them of:

- the purposes for which their information will be processed;
- to whom their information may be disclosed; and
- their right to apply for a copy of their information that is held by us and their right to have any inaccuracies in their information corrected.

If you have any questions regarding our processing of your personal information, please contact the Data Protection Officer at Prudential International Assurance plc, Montague House, Adelaide Road, Dublin 2, Ireland.

* The Prudential Group means our ultimate holding company, Prudential plc, and its subsidiaries.

3. Application – by the applicant(s)

Please issue the bond on the basis specified in this application form.

It is our normal procedure to issue policy documents direct to the Bondholder(s). If you would prefer us to issue these to your financial adviser please tick the box below.

Please issue policy documents to our financial adviser

☐

4. Signatories – to be signed by each Applicant¹⁶

First (or only) Applicant

Signature

Full name

Date

D	D	M	M	Y	Y	Y	Y
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Further Applicant (if applicable)

Signature

Full name

Date

D	D	M	M	Y	Y	Y	Y
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Warning – material facts

A material fact is any fact which might influence the assessment and acceptance of your application. A material fact may affect our decision on whether your Application is acceptable and whether the contract should be subject to any special terms. Failure to disclose a material fact may affect entitlement to benefits under the contract and could result in the contract being void. The need for disclosure applies to any material fact you become aware of when you submit the Application. It also applies to any material fact you become aware of before the contract starts. If you are in any doubt whether certain facts are material, these facts should be included.

Data Protection Acts 1988 & 2003

The Company is registered with the Data Protection Commissioner and will comply with the Irish Data Protection Acts 1988 and 2003 in the processing of this Application and the maintenance and record keeping of any contract(s) concluded as a result of this application.

Notes

¹⁶ If there are more than two applicants please photocopy this Declaration, complete and send in with this application.

Section 9 – Declaration of residence outside Ireland

Each Applicant must read these definitions and then complete the declaration.

Please note that the declaration below regarding non-residence in Ireland must be completed before we can make payments.

Important Irish "Exit" Tax may be applied to the bond (for example on payments from the bond) if this declaration is not completed.

Residence definition – individual

An individual will be regarded as being resident in Ireland for a tax year if s/he either:

- spends 183 days or more in the State in that tax year, or
- has a combined presence of 280 days in the State, taking into account the number of days spent in the State in that tax year together with the number of days spent in the State in the preceding year.

Presence in a tax year by an individual of not more than 30 days in the State will not be reckoned for the purpose of applying the two-year test. Presence in the State for a day means the personal presence of an individual:

- at the end of the day (midnight) for tax years 2008 and earlier, and
- at any time during that day for tax year 2009 onwards.

Ordinary residence definition – individual

The term "ordinary residence" as distinct from "residence" relates to a person's normal pattern of life and denotes residence in a place with some degree of continuity. An individual who has been resident in the State for three consecutive tax years becomes ordinarily resident with effect from the commencement of the fourth tax year.

An individual who has been ordinarily resident in the State ceases to be ordinarily resident at the end of the third consecutive tax year in which s/he is not resident. Thus, an individual who is resident and ordinarily resident in the State in 2006 and departs from the State in that year will remain ordinarily resident up to the end of the tax year 2009.

Declaration of residence outside Ireland

Bondholders resident outside Ireland are required by the Irish Revenue Commissioners to make the following declaration, which is in a format authorised by them, in order to receive payments without deduction of Irish tax.

I/We* declare that (*Delete as appropriate)

- I/We* have read the explanation of the terms detailed in the "residence definitions" above.
- I am/We are* the bondholder in respect of which this declaration is being made.
- I am/We are* not resident or ordinarily resident in Ireland.

If you are making this declaration whilst in the process of setting up your policy, setting up a series of regular withdrawals or making a first partial encashment:

- I/We* hereby undertake(s) to inform Prudential International of any change in my/our/the Company's* country of residence during the life of the policy.

Full name

Habitual residence/address of bondholder(s):

Signature(s) of bondholder(s) or authorised signatory:

Date of this declaration:

D	D	M	M	Y	Y	Y	Y
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Notes

If there are more than two applicants please photocopy this declaration, complete and send in with this application.

This form may be subject to inspection by the Irish Revenue Commissioners. It is an offence under Irish Law to make a false declaration.

This declaration must be signed by bondholder(s) who are neither resident nor ordinarily resident in Ireland or by personal representatives signing on behalf of deceased persons. Where the bondholder is a company, the declaration must be signed by the company secretary or such other authorised officer. It may also be signed by a person who holds power of attorney from the bondholder. A copy of the power of attorney should be enclosed with this declaration.

Full name

Habitual residence/address of bondholder(s):

Signature(s) of bondholder(s) or authorised signatory:

Date of this declaration:

D	D	M	M	Y	Y	Y	Y
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Financial Adviser details

I/We confirm that the Applicants are applying on his/her own behalf:

Financial adviser name

Financial adviser reference number (if applicable)

Telephone number

Fax number

E-mail address

Address

Commission

(a) Initial Commission

(Initial Commission can be given up in favour of Renewal Commission at the rate of 0.1% of Renewal Commission for each 0.6% of Initial Commission)

(b) Renewal Commission

(c) Commission to be given up to the bond to increase the allocation rate of the Bond

Financial adviser checklist

Please ensure the following information/documentation accompanies this form. Failure to provide all relevant information will result in a delay to this application being processed.

Please note that interest will not be credited to payments received prior to the receipt of all documentation requirements

➤ If paying by banker's draft, please make payable to Prudential International

☐

➤ If appropriate, a copy of the STR certificate for each applicant

☐

➤ Tax Residency questions have been answered in Full.

☐

➤ If appropriate, an English language declaration letter

☐

➤ Appropriately certified anti-money laundering documentation for each applicant*

☐

➤ If Regular Withdrawals are required I enclose verification of the Client's Bank Account

☐

* For further information please refer to our anti-money laundering requirements (Spain) document.



www.prudential-international.com

The registered office of Prudential International is in Ireland at Montague House, Adelaide Road, Dublin 2. Prudential International is a marketing name of Prudential International Assurance plc, a life assurance company operating from Ireland. Registration No. 209956. Telephone number + 353 1 476 5000. Prudential International Assurance plc is authorised by the Central Bank of Ireland.