

# International Premier Portfolio from Aviva Life International Limited



## Investment Adviser appointment form

This form should be completed if you wish to appoint an Investment Adviser to act on your behalf for the purpose of making investment decisions in respect of your International Premier Portfolio. If this is the case, you and your Investment Adviser should complete and sign the agreement below. You should satisfy yourself that your Investment Adviser is qualified and/or authorised to provide investment advice.

On completion please return to Aviva Life International Limited, Montague House, Adelaide Road, Dublin 2, Ireland.

With reference to my/our application dated   
 or  
 Bond number,

I/we request the appointment of the following named to act on my/our behalf as Investment Adviser to the funds to which my International Premier Portfolio is to be linked, subject to the terms and conditions set out in Section 2 below.

**1 Personal details**

Name of first bondholder/trustee/ authorised signatory *(delete as appropriate)*

Name of second bondholder/trustee/ authorised signatory *(delete as appropriate)*

Name of third trustee/authorised signatory (if any) *(delete as appropriate)*

Name of fourth trustee/authorised signatory (if any) *(delete as appropriate)*

**2 Delegation of power to Investment Adviser**

I/we wish to appoint the Investment Adviser named below.

Name of Investment Adviser

The Investment Adviser is/is not *(delete as appropriate)* the same person as my/our financial adviser. If not, please state the name and address of your financial adviser.

Name of financial adviser

Address

*Country* *Postcode*

I/we wish to appoint my Investment Adviser to act on my/our behalf for the purpose of making investment decisions in respect of my non-discretionary managed holdings within International Premier Portfolio. These decisions are limited to authorising the Investment Adviser to exercise any option relating to buying and selling funds in my bond. An International Premier Portfolio Buy/Sell Instruction Form should be completed if you wish Aviva Life International Limited to buy or sell funds in your bond.

I/we agree to pay my/our Investment Adviser a fee for carrying out this service of  % p.a.  
*(Insert % amount, maximum 1% and must increase in 0.05% steps. The fee is a percentage of the value of the non-discretionary holdings'. The fee will be accrued daily and deducted each calendar quarter from your International Premier Portfolio).*

I hereby permit any employee of my investment adviser's firm to exercise the power granted by this agreement *(tick box if applicable)*

*continued*

**2 Delegation of power to Investment Adviser** *continued*

I/we understand that Aviva Life International Limited shall not be held liable for any loss caused as a result of this appointment or any action taken by my Investment Adviser.

I/we request that Aviva Life International Limited accept this appointment until further notice, which must be given in writing to Aviva Life International Limited at the address quoted above.

I/we understand that in the case of UK resident individuals that the investment adviser fee will be treated as a partial withdrawal from my policy and will form part of my annual 5% tax deferred withdrawal allowance for tax purposes.

Signature of first bondholder/ trustee/authorised signatory <i>(delete as appropriate)</i>		Date	/ /
Signature of second bondholder/ trustee/authorised signatory <i>(delete as appropriate)</i>		Date	/ /
Signature of third trustee/ authorised signatory <i>(delete as appropriate)</i>		Date	/ /
Signature of fourth trustee/ authorised signatory <i>(delete as appropriate)</i>		Date	/ /

On receipt of this agreement Aviva Life International Limited will accept all instructions regarding the non-discretionary managed holdings in your bond from the Investment Adviser on your behalf, until we receive written instructions from you to the contrary.

**3 To be completed by the Investment Adviser**

Name of Investment Adviser	
Address	
E-mail	
Telephone number	
Fax number	
Name of Regulator	
Registration number	
Category of membership and relevant permitted activity	

In accepting the authority of Investment Adviser to make recommendations for the buying/selling of non-discretionary managed holdings, given to me by the bondholder, I agree to the following:

- All instructions for the purchase or sale of funds will be in respect of those funds specifically agreed by Aviva Life International Limited as being eligible within the policy.
- All instructions will be given in writing to Aviva Life International Limited.
- All deals must be placed by Aviva Life International Limited.
- Aviva Life International Limited reserves the right to reject or accept advice given by the Investment Adviser at its absolute discretion.
- The Investment Adviser must maintain such authorisation as is necessary to act as Investment Adviser under the regulations and legislation in the country in which the advice is given.
- The Investment Adviser must immediately notify Aviva Life International Limited in writing should the Investment Adviser's regulatory authorisation change or cease, or should the regulator take or threaten to take disciplinary action against the Investment Adviser.
- Aviva Life International Limited has the right to withdraw the Investment Adviser facility from the Investment Adviser without specifying a reason and on giving one month's written notice to the bondholder.
- The Investment Adviser's appointment shall cease immediately upon the death, bankruptcy, dissolution or insolvency of the Investment Adviser or any composition with creditors or if the Investment Adviser is in breach of any regulatory requirements or it becomes illegal for the Investment Adviser to continue to act in this capacity.

**3 To be completed by the Investment Adviser** *continued*

Signature

Date

Full name

For and on behalf of

**4. Bank details**

Please provide details of your bank to receive your fee (if applicable).

Banker's name

Branch

Address

<input type="text"/>	
<input type="text"/>	
<i>Country</i>	<i>Postcode</i>

Bank account name

Sort code

(For GBP payments through a UK bank)

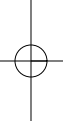
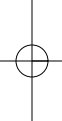
Swift code

(For all GBP payments through a non-UK bank)  
(For all EUR and USD payments)

Bank account number

International Bank Account Number (IBAN)

(Required for all EU payments outside of the UK)



Aviva Life International Limited, trading as Aviva, is authorised and regulated by the Central Bank of Ireland and is also authorised by the Financial Services Authority in the UK. If Aviva Life International Limited should become unable to meet its liabilities, the Financial Services Compensation Scheme will protect the eligible policyholder of an Aviva Life International Limited bond who is habitually UK resident at the time the contract commences. Registered Office: One Park Place, Hatch Street, Dublin 2, Ireland. Registered in Ireland No 303257.  
[www.aviva.co.uk/international](http://www.aviva.co.uk/international)

IN 85 026 01/2011



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