

Request for an estimated discount illustration (Nucleus Onshore and Offshore Bond accounts only)

Nucleus client relations, PO BOX 26968, Glasgow G2 9DY.

Please complete and sign before sending to us at the above address or by attaching to a Jira. If any party signs but fails to date a signature, the date that we receive this form will be deemed to be the date that the signing party signed this agreement.

If you have any questions please contact your Nucleus client relations manager who will be delighted to help.

Nucleus and the providers of the Nucleus Onshore Bond (Sanlam Life & Pensions UK Limited and Sanlam Financial Services UK Limited) and the Nucleus Offshore Bond (RL360 Insurance Company Limited), each data controllers under the applicable data protection legislation, will process the personal data and sensitive or 'special' personal data (such as health and medical information) provided in this form in order to estimate the discounted value of the gift into trust and to administer the relevant policy accordingly.

By completing this form you confirm:

- you have obtained the consent of the applicant(s) to provide the personal data and any sensitive or 'special' personal data (such as health and medical information); and
- you have explained to the applicant(s) the purposes for which their personal data and special personal data will be used.

Applicant details

First applicant

Name

Title Miss Mr Mrs Other (please state)

Date of birth

Investment amount

£

Details of any proposed withdrawals e.g. 4% annually

%

General health information

Second applicant

Name

Title Miss Mr Mrs Other (please state)

Date of birth

Investment amount

£

Details of any proposed withdrawals e.g. 4% annually

%

General health information

Signed (we require a handwritten signature)

Date

Signed (we require a handwritten signature)

Date