



# Surrender charges declaration form

(if available)

**To be completed by the policy owner(s) when applying for a new unit-linked policy.****Full name of policy owner 1****Full name of policy owner 2****Please select the product you are applying for.****I/we am/are applying for a Futura**

I/We have signed a document which describes the value of my/our policy if I/we choose to terminate and get back some ('Partial Surrender') or all ('Surrender') of the policy value. The document showed the Surrender Charges and Surrender Value of the policy at the end of each year. I/We signed a copy of the document that was printed in black and white and I/we confirm that the document was shown to me/us on a computer screen on which the surrender values and charges were in red writing. I/We confirm that the importance of the Surrender Charges and Values were explained to me/us by our financial professional.

**I/we am/are applying for a Wealth Accumulation plan Simple Wealth Global Choice RSP/Legacy**

I/We have signed a document which describes the value of my/our policy if I/we choose to terminate and get back some ('Partial Surrender') or all ('Surrender') of the policy value. The document showed the Surrender Charges and Surrender Value of the policy at the end of each year. I/We signed a copy of the document that was printed in black and white and I/we confirm that the document was shown to me/us on a computer screen on which the surrender values and charges were in red writing. I/We confirm that the importance of the Surrender Charges and Values were explained to me/us by our financial professional. I/We confirm that I/we am/are aware that this product has a limited or no protection benefit

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I/We confirm that this/these signature(s) is/are mine/ours or that/those of my/our appointed legal representative(s).

**Signature of policy owner 1****Signature of policy owner 2**

Date

Date

**Financial professional's details** (To be completed by your financial professional)**Full name****Signature**

Date