



HANSARD
WORLDWIDE

Signature Form

Declaration and Signature Form
Capital Builder Worldwide
Vantage Platinum Worldwide
Worldwide Personal Portfolio
Individual Applicant



1. Important Notes

Please read the following important notes with regards to your application in conjunction with the Privacy Policy document which is available to view on our website: hansard.com/privacy-policy. Any reference to “the Company”, “we”, “us”, and “our” means Hansard Worldwide Limited. Any reference to “I”, “me” and “my” means the Contract Owner(s) or prospective Contract Owner(s). Any reference to an Intermediary means an Independent Financial Advisor who is an independent party, not an agent of the Company, who is nominated by you to provide financial advice and who submits the application on your behalf.

The Company will only accept an application submitted by an Intermediary. Your Intermediary is acting solely as your agent when consulting with you and submitting your application to the Company. Accordingly, the Company cannot be held responsible for the advice, representations, acts or omissions, made in connection with your application. Please therefore ensure that the application conforms with your instructions before you sign this form.

2. Data Protection Declaration

The Company Privacy Policy describes how we collect and use personal information provided to us as a Data Controller for the purposes of effecting and administering the Contract applied for. By signing this Signature Form and providing personal information to us during your Application, you acknowledge that the Company could not provide the Contract without the provision of accurate and sufficient personal information. All applicant rights are documented in the Privacy Policy.

I understand that the Company will use the information supplied on or in conjunction with my application to assess and decide upon my application for the product (and/or any new insurance products) and to administer my Contract.

I acknowledge that the information will be held on the Company’s records (both manual and electronic) is to be used for underwriting, administration (including contribution collection, information storage and record-keeping), tax reporting, claims assessing and handling and other related purposes, marketing analysis, and for the purpose of sending information to me in relation to my Contract (and any new insurance products). The Company may record telephone conversations to offer additional security, help resolve complaints and improve our client service.

I understand that the Company may process, share, and transfer my personal data with recipients outside the Bahamas (e.g., an outsourcing provider of administrative services and/or to other branches or affiliates of the Company) where necessary for the performance of the Contract or in order to comply with any legal obligation to which the Company is subject.

I understand that the Company may be required to transfer or share any such information with regulators and other law enforcement agencies for the performance of its obligations related to the international sanctions and other regulations applicable to the Company.

3. Politically Exposed Person* Self-Declaration (tick as appropriate)

- | | | | | |
|--|-----|--------------------------|----|-------------------------------------|
| 1. I am a Politically Exposed Person (“PEP”). | Yes | <input type="checkbox"/> | No | <input checked="" type="checkbox"/> |
| 2. I have a close associate(s)/family member(s) who are PEPs | Yes | <input type="checkbox"/> | No | <input checked="" type="checkbox"/> |

If the answer to 3.2 is “Yes” please provide full details below

Name of PEP

PEP Status:

Relationship:

*A Politically Exposed Person (PEP) is an individual who has been entrusted with a prominent public function, such as a senior politician, senior government official, or senior executive of a state-owned corporation. PEPs are defined as individuals who have been appointed to a high-profile position by a community institution, an international body, or a state. The definition of a PEP extends to immediate family members and known close associates of the PEP.

4. Application Declaration

In reference to my application submitted in the name(s) below, by signing this form I confirm the following:

1. I have read, fully understood, and retained the Product Prospectus, Key Information Document, Terms and Conditions, Schedule One, Privacy Policy and a copy of this Signature Form. My Intermediary has explained the content of these documents to me such that I understand the nature, risks and costs of this product and how it is deemed suitable by my Intermediary based upon my/our financial capabilities and circumstances and in helping to meet my financial needs/goals.
2. I have read and fully understood the important notes and the data protection declaration on this form.
3. My Intermediary is acting solely as my agent in respect of my application. I understand and agree that my Intermediary also has the authority to:
 1. review and monitor my Contract and investment performance via the Online Account
 2. instruct a withdrawal and/or termination on my behalf via the Online Account to my nominated bank account without further authority or confirmation from me.

Until I give the Company written notice to the contrary, my Intermediary shall continue to act in this capacity.

4. I understand that submission of my Application and signing this Signature Form does not in itself establish a Contract and that the Company has the right to refuse an application.
5. I have been made aware that providing certified documentation relating to my proof of identity, verification of address and tax self-certification information is required by applicable law and regulation.
6. I am a tax resident only in the jurisdictions stated in my Application and no other jurisdictions.
7. I am not a US Citizen or US resident alien with an obligation to file any tax returns (income, estate, gift, or the like) to the Internal Revenue Service of the USA ("IRS").
8. I will inform the Company immediately of the details of my new address if during the life of this Contract I change my residential address or if any of my personal details change.
9. I fully understand and personally accept that the assets I choose to hold within my Contract may not be easily and quickly realisable and where this is the case, I agree that the Company reserves the right to transfer the assets in specie to me
10. In the case of a jointly owned Contract, I understand that either myself or the second Contract Owner will be able to instruct a withdrawal/termination from our Contract using the Online Account. I understand the proceeds of the withdrawal/termination will be paid into our nominated bank account, the details of which both myself and the second Contract Owner have agreed, and which cannot be changed without authorisation of us both.
11. I understand that the application will be underwritten and issued in The Bahamas and is subject to Bahamas law.
12. To the best of my knowledge and belief, all statements and declarations made in my Application and this Signature Form are true and complete and I wish to proceed with my Application on the basis of the information provided.
13. The Application conforms with my instructions before it was submitted to the Company; it has been submitted on my behalf, and all information used to populate the Application has been provided with my consent. If any person other than myself has completed any part or all of my Application they did so with my full authority.

Applicant 1

Signed

Date

Please print full name

Applicant 2 (Joint applications only)

Signed

Date

Please print full name

INTERMEDIARY USE ONLY

Intermediary Declaration

If the applicant is effecting this Contract as a complete or partial replacement for another Contract, please state the reason(s) why you are recommending this Contract to the applicant. Please provide details of previous Contracts.

I confirm that I have personally witnessed that the applicant has signed this client Signature Form.

Intermediary Signature

Date

Please print full name

Entity Code - -

The contents of the Product Prospectus, Key Information Document, and Terms & Conditions (including the product features, charges, and risks) have been provided to the applicant and explained thoroughly based on my understanding of the applicant's(s) financial capabilities and circumstances and in helping to meet their financial needs/goals.

I confirm that I have seen the original customer identification documents during the Application process and have checked the name and identity of the individual(s). I have submitted a certified copy of the relevant documents for the Company's records.



HANSARD
WORLDWIDE

Hansard Worldwide Limited

Incorporated in The Bahamas (no. 200975B) and authorised by the Insurance Commission of The Bahamas.

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