

Please read each section of the form carefully and complete all relevant sections. Once complete, the form must be returned by mail to Nordben.

Acceptance of the transfer is in the discretion of Nordben and is subject to Nordben receiving and being satisfied with the appropriate verification documentation in respect of the new grantee to comply with the company's internal controls and procedures, as well as all applicable money laundering laws and guidelines.

Nordben expressly reserves its right to refuse the transfer unless Nordben is satisfied that by agreeing to such transfer, there would be no breach of any law, regulation, regulatory guidelines or directive and that there would be no reputational risk to Nordben.

Please complete this form in block capitals.

## A. PARTIES

Policy number:	Effective date of transfer (dd/mm/yyyy)
Grantee	New grantee
Name:	Name:
Address:	Address:
Post code:	Post code:
Life Assured	Nordben
Name:	Name: Nordben Life and Pension Insurance Co. Limited
Address:	Address: Harbour House South Esplanade St Peter Port Guernsey
Post code:	Post code: GY1 1AP

## B. THE NEW GRANTEE

Who advised you on this transfer of grantee rights and obligations?:

SPP                       Mandatum                       Storebrand                       Varma

Other  Please give details: \_\_\_\_\_

Future premiums will be paid by:

New grantee                       Life assured                       Other

If other, please supply address for invoice:                      Please supply details of the bank which will make the payment:

Address:                      Bank name: \_\_\_\_\_

\_\_\_\_\_                      Sort code: \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

Post code: \_\_\_\_\_

1. The grantee effected the attached policy issued by Nordben (the policy) in terms of which the life assured is entitled to certain policy benefits.
2. The grantee holds certain rights and obligations under the policy which certain rights and obligations the grantee wishes to transfer by way of assignment to the new grantee.
3. The new grantee wishes to accept transfer of the rights and obligations of the grantee under the policy and thereafter to hold all such rights and obligations and act as if the new grantee were the original grantee under the policy.
4. Nordben and the life assured have agreed to the said transfer by way of assignment of the rights and obligations of the grantee under the policy to the new grantee and to the release of the grantee from all obligations under the policy.
5. Nordben takes no responsibility or liability for any tax consequences in any jurisdiction that may result to any one or more of the grantee, the new grantee or the life assured in consequence, directly or indirectly, of this agreement, each party acknowledging by its signature hereto that it is responsible for taking its own tax advice and accepts the tax consequences for its own account.

## C. AGREEMENT

1. The grantee hereby transfers and assigns all its rights and obligations under the policy to the new grantee and the new grantee hereby accepts all such rights and obligations.
2. Nordben and the life assured hereby accept the transfer and assignment of the rights and obligations of the grantee to the new grantee and accept that the new grantee will hereafter hold all rights and be subject to all obligations under the policy in the place and stead of the grantee.
3. The new grantee, Nordben and the life assured agree that with effect from the date specified above, the policy shall be read so that all references to "grantee" therein, (save for the reference to the person who effected the policy), shall be read as references to the new grantee.

## HOW WILL THIS DOCUMENT BE USED?

Nordben Life and Pension Insurance Co. Limited will use this document and other relevant details to transfer the rights and obligations of the grantee under the policy. For this purpose this document will be disclosed to relevant Nordben staff and to any third party administrator. By signing this form you will have given consent to our disclosing appropriate details from this document to them. No sensitive data is passed on to a third party unless the correct legal procedure is followed.

This document will be held on file and will be disposed of in accordance with the terms of the contract.

Nordben Life and Pension Insurance Co. Limited takes the privacy and security of data held on its clients very seriously. We have published a guide to ensure that our clients are informed about their rights and our obligations under The Data Protection (Bailiwick of Guernsey) Law. The guide is available on our website [www.nordben.com/data-protection](http://www.nordben.com/data-protection).

## D. SIGNATURES

<b>IN WITNESS WHEREOF</b> the parties hereto have hereunder set their respective hands the day and year first above written. Signed by the said grantee
Name:
Signed by the said new grantee
Name:
Signed by the said life assured
Name:
Signed by the said Nordben
Name:

## E. ADDITIONAL DOCUMENTATION REQUIREMENTS

Please also attach the following documents for verification purposes and tick to indicate which documents you have enclosed:	
<b>Requirements if the new grantee is an individual person</b>	
A completed Client Verification Document (and accompanying documents), available at <a href="http://www.nordben.com">www.nordben.com</a> under the Individual/Forms/Annuity Plan section.	<input type="checkbox"/>
<b>Requirements if the grantee is an employer (i.e. company)</b>	
A completed Corporate Application form (and accompanying documents), available at <a href="http://www.nordben.com">www.nordben.com</a> under the Individual/Forms/Annuity Plan section.	<input type="checkbox"/>
<b>In all circumstances</b>	
The original policy document	<input type="checkbox"/>
<b>Note:</b>	
<b>A completed Corporate Application form is not required if the new grantee has an existing business relationship with Nordben.</b>	

**Nordben Life and Pension Insurance Co. Limited**  
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