

Illustration Request Form

Veritas Life Policy

Type of Policy Required: Capital Redemption Whole of Life

Product Type Required: Collective Personalised

IFA Company:

IFA Name:

Adviser Email Address:

Client/s Name:

Age/s and Date of Birth (dd/mm/yyyy):

Client's Email Address:

Nationality/ies:

Country of Residence:

Policy Currency:

Premium Amount:

Fees

Initial Adviser Fee: *Range: 0% - 7%*

Ongoing Adviser Fee: *Range: 0% - 1%*

DFM/Investment Adviser Fee: %

Establishment Fee Recovery Period: 10 years 8 years 5 years 4 years 3 years 2 years 1 year

Ongoing Service Charge

This is non RDR-compliant and is usually for policyholders who are currently outside of the UK. This charge is taken as a policy charge across the bond.

Please enter the annual ongoing service charge you authorise us to pay to your financial adviser as a % of the value of the portfolio fund.