

Client information – International Portfolio Bond

This is not an application form

This 'client information' form is intended to help identify and collate the necessary client details needed when converting an illustration into an online submission for the International Portfolio Bond.

Any data you collect on this client information form is your sole responsibility. You shall ensure that you obtain all necessary rights and permissions to disclose any of the data in this client information form to us in the International Portfolio Bond online application.

There's no requirement to complete, or return this form to Prudential International Assurance.

Applicant 1 details

If there's more than two lives assured, details can be captured in the section headed additional information.

Name	
Date of birth	
Gender	
Marital status	
Nationality	
Address	
Postcode	
Contact numbers (mobile, home and work)	
Preferred phone number for policy servicing	
Email address (optional)	

Employment details

National Insurance Number	
Employment status	

Occupation details

Current occupation (or previous occupation, if retired or unemployed)	
Current industry (or previous industry, if retired or unemployed)	
Current annual income (or previous income, if retired or unemployed)	

Bank account details

Account type: Bank account ☐ Building society ☐

Name on account	
Sort code	
Account Number	

Applicant 2 details

If there's more than two lives assured, details can be captured in the section headed additional information.

Name	
Date of birth	
Gender	
Marital status	
Nationality	
Address	
Postcode	
Contact numbers (mobile, home and work)	
Preferred phone number for policy servicing	
Email address (optional)	

Employment details

National Insurance Number	
Employment status	

Occupation details

Current occupation (or previous occupation, if retired or unemployed)	
Current industry (or previous industry, if retired or unemployed)	
Current annual income (or previous income, if retired or unemployed)	

Bank account details

Account type: Bank account ☐ Building society ☐

Name on account	
Sort code	
Account Number	

Primary bond holder

Who is the primary bond holder for receiving correspondence	
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Product details

What type of bond? Life assured ☐ Capital redemption ☐

What type of lives assured? Single life ☐ Joint life last death (2-10 lives assured) ☐

Who are the lives assured? (Name & DOB Required)	
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Is at least one life assured 89 years old or younger? Yes ☐ No ☐

Money in

What is the payment type? Bank transfer ☐ Cheque ☐

Payment amount (£)	
What is the source of wealth for the payment	
Bank account where the funds are coming from	

Is the bank account a joint account? Yes ☐ No ☐

If a joint bank account who is the joint bank account holder	
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Money out

If any withdrawals are being taken the payer and payee must be the same person and the account must be the same as the account for paying out.

Do you want to set-up a regular withdrawal?

Yes

☐

No

☐

Regular withdrawal amount	
Regular withdrawal frequency	
Date in month for withdrawal	

Additional Information

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Acting on someone's behalf?

When giving us information about another person, you confirm that they have appointed you to act on their behalf.

This includes providing consent to:

- the processing of their personal and sensitive data
- receive any data protection notices on their behalf
- receive marketing information as indicated.

Marketing Preference

Please confirm how your client wishes to receive marketing materials:

Phone (home/work)

☐

Mobile/SMS

☐

Mail

☐

Email

☐

In some circumstances if your client has other policies with Prudential they may be contacted directly with 'servicing' messages regarding those products.

www.pru.co.uk/international

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