

Request to add an additional life/lives assured
For all contracts except the Flexible Life Plan and
Whole of Life Plan



Canada Life

Please complete in BLOCK CAPITALS and tick small boxes where appropriate

Altering the lives assured on an existing account is a chargeable event. It is therefore recommended that policyholder(s) consult their professional adviser before adding more lives to their Canada Life International Limited or CLI Institutional Limited account/policy. There can only be a total of six lives assured on an account/policy.

Name(s) of policyholder(s)		
Account/policy number		
	Additional life assured 1	Additional life assured 2
Title (Mr, Mrs, Miss, Ms, other)		
Surname		
Forename(s) in full		
Sex	Male <input type="checkbox"/> Female <input type="checkbox"/>	Male <input type="checkbox"/> Female <input type="checkbox"/>
Marital status	Single <input type="checkbox"/> Married <input type="checkbox"/> Civil Partner <input type="checkbox"/> Widowed <input type="checkbox"/> Divorced/Dissolved <input type="checkbox"/>	Single <input type="checkbox"/> Married <input type="checkbox"/> Civil Partner <input type="checkbox"/> Widowed <input type="checkbox"/> Divorced/Dissolved <input type="checkbox"/>
Any previous name(s) or alias(es)		
Permanent residential address in full		
	Postcode	Postcode
Date of birth (day, month, year)	/ / 2	/ / 2
Country of birth		
If you were born outside the UK, how long have you been a UK resident?	Year(s) Month(s)	Year(s) Month(s)
Permanent UK resident	Yes <input type="checkbox"/> No <input type="checkbox"/>	Yes <input type="checkbox"/> No <input type="checkbox"/>
If 'No', please confirm your country of habitual residence		
Nationality		

Please complete in BLOCK CAPITALS and tick small boxes where appropriate

Additional life assured 3

Additional life assured 4

Title (Mr, Mrs, Miss, Ms, other)

Surname

Forename(s) in full

Sex Male Female

Male Female

Marital status Single Married Civil Partner

Single Married Civil Partner

Widowed Divorced/Dissolved

Widowed Divorced/Dissolved

Any previous name(s) or alias(es)

Permanent residential address in full

Postcode

Postcode

Date of birth (day, month, year) / /

/ /

Country of birth

If you were born outside the UK, how long have you been a UK resident?
Year(s) Month(s)

Year(s) Month(s)

Permanent UK resident Yes No

Yes No

If 'No', please confirm your country of habitual residence

Nationality

Data protection

Any personal information you may provide to Canada Life International Limited or CLI Institutional Limited (the Company) as data controller will be treated in accordance with the Isle of Man Data Protection Act 2002.

(Canada Life International Limited (CLI) will be defined as the 'Company' in the remainder of this statement).

By signing this form you consent to the Company using and sharing your personal information as set out in this notice including, without limitation, the processing of personal sensitive data.

If submitting personal information about another person, by signing this form you confirm that you have their consent to provide such information to the Company and for their information to be used as set out in this notice.

Using personal information

The Company uses personal information to undertake any activity relating to its policies, products and services and, where relevant, to process applications, set-up and administer policies, products and services and handle any claims.

Sharing personal information

The Company may share personal information:

- with other Canada Life companies including those outside the European Economic Area;
- its relevant reinsurers;
- with other companies, organisations and associations and/or credit reference agencies in order to prevent, detect or investigate financial crime or fraud;
- with approved service providers including providers of medical services and opinions;
- with credit reference agencies;
- with relevant industry bodies such as the Association of International Life Offices, if appropriate;
- with the Isle of Man Financial Services Authority;
- with the Central Bank of Ireland;
- with the UK Financial Conduct Authority;

- with the UK Prudential Regulation Authority;
- with any other regulators with competent jurisdiction;
- with the Isle of Man Financial Services Ombudsman Scheme;
- with Ireland's Financial Services Ombudsman's Bureau;
- with the UK Financial Ombudsman Service;
- with any other applicable financial services ombudsman schemes or supervisors; and
- in any circumstances if permitted or required to do so by law or if the Company has consent to do so.

Where the information is being released to any of the above, the Company may use electronic communications.

Relevant industry bodies may share information about you collected by other insurances companies with the Company.

The Company will not use your information to advise you of other products and services offered by third parties or companies within the Canada Life marketing group.

Accessing personal information

A person whose personal information is held by the Company has various rights including the right to:

- have any incorrect personal information corrected; and/or
- access the personal information the Company holds for which a fee may be charged.

To do so and/or if you need more information, please contact the Company. Requests and queries should be addressed to each company as appropriate:

The Data Protection Officer
**Canada Life International Limited/
CLI Institutional Limited**
Canada Life House
Isle of Man Business Park
Douglas
Isle of Man
IM2 2QJ

Policyholder/Trustee/Authorised signatory 1

Signature

Print name

Date (day, month, year)

Policyholder/Trustee/Authorised signatory 2

Policyholder/Trustee/Authorised signatory 3

Signature

Print name

Date (day, month, year)

Policyholder/Trustee/Authorised signatory 4



Canada Life International Limited, registered in the Isle of Man no. 33178.
Registered office: Canada Life House, Isle of Man Business Park, Douglas, Isle of Man IM2 2QJ.
Telephone: +44 (0) 1624 820200 Fax: +44 (0) 1624 820201 www.canadalifeint.com
Member of the Association of International Life Offices.

Canada Life Limited is authorised by the Prudential Regulation Authority and regulated by the Financial Conduct Authority and the Prudential Regulation Authority.
Canada Life International Limited and CLI Institutional Limited are Isle of Man registered companies authorised and regulated by the Isle of Man Financial Services Authority.
Canada Life International Assurance (Ireland) DAC is authorised and regulated by the Central Bank of Ireland.



CLI Institutional Limited, registered in the Isle of Man no. 108017C.
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