

Request to add an additional life/lives assured

**For all contracts except the
Flexible Life Plan and Whole of Life Plan**



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, Canada Life International Assurance (Ireland) DAC or CLI Institutional Limited account/policy (The company). There can only be a total of six lives assured on an account/policy.

Name(s) of policyholder(s)	<input type="text"/>	
	<input type="text"/>	
Account/policy number	<input type="text"/>	
	Additional life assured 1	Additional life assured 2
Title (Mr, Mrs, Miss, Ms, other)	<input type="text"/>	<input type="text"/>
Surname	<input type="text"/>	<input type="text"/>
Forename(s) in full	<input type="text"/>	<input type="text"/>
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)	<input type="text"/>	<input type="text"/>
Permanent residential address in full	<input type="text"/>	<input type="text"/>
	<input type="text"/>	<input type="text"/>
	<input type="text"/>	<input type="text"/>
	Postcode	Postcode
	<input type="text"/>	<input type="text"/>
Date of birth (day, month, year)	<input type="text"/>	<input type="text"/>
Country of birth	<input type="text"/>	<input type="text"/>
If you were born outside the UK, how long have you been a UK resident?	Year(s) <input type="text"/> Month(s) <input type="text"/>	Year(s) <input type="text"/> Month(s) <input type="text"/>
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	<input type="text"/>	<input type="text"/>
Nationality	<input type="text"/>	<input type="text"/>

Additional life assured 3

Additional life assured 4

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

Surname

Forename(s) in full

Sex Male Female

Marital status Single Married Civil Partner
Widowed Divorced/Dissolved

Any previous name(s) or alias(es)

Permanent residential address in full

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)

Permanent UK resident Yes No

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

Nationality

Male Female

Single Married Civil Partner
Widowed Divorced/Dissolved

Postcode

/ /

Year(s) Month(s)

Yes No

Data protection

Data Protection Notice

Any personal information that you may provide to Canada Life International Assurance (Ireland) DAC (CLIAI) as data controller will be treated in accordance with the Data Protection Acts (as amended)

(CLI, CLII and CLIAI together will be defined as 'Canada Life' in the remainder of this notice).

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

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

Using Personal Information

We use personal information to undertake activities relating to the setting up, administration and renewal of our policies, products and services. This includes processing applications and handling any claims. For the majority of our business we will rely on the performance of our contractual arrangements with you as the legal basis for processing.

We do not use policyholder or member personal data for marketing purposes and we do not make your personal information available to third parties for the purpose of direct marketing.

The nature of our business is to provide investments, life and pensions cover, critical illness, income protection and employer related group products. To do this we need to use the personal information provided to carry out analysis of actuarial risks (risks of gains or losses), mortality and morbidity risks and pricing. This will be carried out in accordance with the Institute & Faculty of Actuaries' data handling protocols.

We use an underwriting engine to process some applications and quotations which will use an element of automated decision making.

Exceptionally, we may rely on our legitimate interests to process your personal data. When we do, we will demonstrate compelling legitimate grounds for doing so.

For employer-related group insurance products the Data Protection Act permits appropriate information about employees to be provided by an employer to an insurer without individual consent (including details of long-term absentees, current and previous claimants, and medical underwriting decisions).

For employer-related group products the Data Protection Act permits that members may individually withdraw their consent, in those instances Canada Life will be unable to provide cover for that individual.

When medically underwriting or assessing a claim we will obtain consent from the employee.

Sharing personal information

We share personal information only on the basis of the purposes for which it was collected. This notice is intended to illustrate the instances where data may be shared. However, we will share your data only for the limited and compatible purposes for which it was originally obtained:

- with other Canada Life group companies including those outside the European Economic Area (EEA);
- with any of our service providers, reinsurers and / or regulators;
- with other insurers and government agencies, including without limitation Her Majesty's Revenue and Customs (HMRC), Department of Work and Pensions (DWP);
- in order to prevent, detect or investigate financial crime including fraud or other criminal activity, we may share your data with other companies (including private investigators), organisations (including fraud prevention agencies and databases), public bodies (including the police) and associations and credit reference agencies;
- we will not share your medical information with anyone other than yourself without your consent except as described in the next bullet point. This includes your employer, spouse, other relatives, friends or your legal or professional adviser. In some circumstances, it may be appropriate to advise your employer about your medical information, for example, to recommend

alternative supportive therapy. However, we will seek your consent in such circumstances;

- for employer-related products and services only, some medical information related to underwriting decisions and non-medical information about you necessary for lawful policy and claim administration purposes will be shared with your employer;
- we will not share non-medical information concerning you with your spouse, other relatives, friends or your legal or professional adviser unless you provide your consent to us in writing;
- for insurance related products, with your own doctor or relevant medical professionals; and/or
- in any circumstances if permitted or required to do so by law or if we have your consent to do so.

International Transfers

Given the global nature of our business, we use third party suppliers and outsourced services (including cloud-based services), which can require transfers of personal information outside of the EEA. In doing so, we will ensure there are contractual arrangements in place with those organisations who have appropriate organisational and technical measures to protect your personal information.

Retention of your personal data

We will keep your personal data only for so long as is necessary and for the purpose for which it was originally collected. In particular, for so long as there is any possibility that either you or we may wish to bring a legal claim under this insurance, or where we are required to keep your personal data due to legal or regulatory reasons.

YOUR RIGHTS AND CONTACT DETAILS OF THE INFORMATION COMMISSIONER'S OFFICE (ICO)

You may have the right to require us to:

- provide you with further details on the use we make of your personal information or your special categories of data;
- provide you with a copy of the personal information that you have provided to us or which we hold;
- update any inaccuracies in the personal information we hold;
- delete any special category of data or personal information for which we no longer have lawful grounds to use;
- cease processing of your personal information that is based on consent, by withdrawing your consent to that particular processing;
- cease any processing based on legitimate interests grounds, unless our reasons for undertaking that processing outweigh any prejudice to your data protection rights; and
- restrict how we use your personal information whilst a complaint is being investigated.

In certain circumstances, we may need to restrict the rights listed above in order to safeguard the public interest (e.g. the prevention or detection of crime), our interests (e.g. the maintenance of our legal responsibilities) and for the performance of our contract with an employer who is the policyholder for employer-related products and services.

Data Protection Officer (DPO)

If you have any questions, or complaints, in relation to our use of your personal information, you should first contact our DPO, on the details below:

**Canada Life International Limited,
Canada Life House, Isle of Man Business Park,
Douglas, Isle of Man, IM2 2QJ**

**Canada Life International Assurance (Ireland) DAC,
Irish Life Centre, Lower Abbey Street, Dublin1.**

In the unlikely event that you are dissatisfied with our response, you have the right to take the matter up with the Information Commissioner's Office (ICO), whose addresses are:

Isle of Man: Information Commissioner's Office, First Floor, Prospect House, Prospect Hill, Douglas, Isle of Man, IM1 1ET

Ireland: Data Protection Commissioner, Canal House, Station Road, Portllington, R32 AP23 Co. Laois

The full version of our DPN can be found on our website, www.canadalife.co.uk or is available upon request by calling 01624 820200.

This DPN is dated 5th March 2018. Any future updates will be made available as described above.

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

By signing this form I/we consent to the Company using and sharing my/our personal information as set out in the Data Protection wording on page 4.

Life assured 1

Signature

Print name

Date (day, month, year)

Life assured 2

Life assured 3

Signature

Print name

Date (day, month, year)

Life assured 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 International Assurance (Ireland) DAC, registered in Ireland no. 440141. Registered office: Irish Life Centre, Lower Abbey Street, Dublin 1, Ireland Telephone: +44 (0) 1624 820200 Fax: +44 (0) 1624 820201 www.canadalifeinternational.ie 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.



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