

Top Up Requirements - Regular and Single Premiums

Requirements:

✓ Completed [Top Up Application Form](#)

This top up application form, if completed in full addresses all requirements for a Top Up to a PORTUS policy.

This includes both Regular and Single Premium Top ups to all products.

It also addresses source of wealth and source of funds requirements for an Investment Bond.

Regular and Single Premium Top Up Form	
<small>For the most effective application of funds to your plan, please ensure all relevant sections of this form are fully completed before submitting to our offices. Funds will only be applied once the details filed from the date of receipt of all requirements. It is important to ensure that all information is provided from the outset.</small>	
Financial Adviser Details	
Financial Adviser name	<input type="text"/>
Financial Adviser code	<input type="text"/>
Commission profile	<input type="text"/>
Plan Owner Details	
Customer name	<input type="text"/>
Plan number	<input type="text"/>
Address	<input type="text"/>
Single Premium Top Up Details	
Proposed top up amount	<input type="text"/>
Employer contribution	<input type="text"/> % or <input type="text"/>
Employee contribution	<input type="text"/> % or <input type="text"/>
AVC contribution	<input type="text"/> % or <input type="text"/>
Annual salary	<input type="text"/> (for company premium only)
Increase Regular Premiums	
Frequency	monthly <input type="radio"/> quarterly <input type="radio"/> half yearly <input type="radio"/> yearly <input type="radio"/>
Effective date of increase	next dated debit date <input type="radio"/> or <input type="text"/>
Old premium	<input type="text"/>
New premium	<input type="text"/>
Employer contribution	<input type="text"/>
Employee contribution	<input type="text"/>
AVC contribution	<input type="text"/>
Total contribution	<input type="text"/>
Regular premiums will automatically be invested in the current fund choice unless we are advised otherwise.	
Fund Choice - Single Premiums Only	
<small>Note: if a desirable investment strategy is in operation on a plan, we will automatically invest funds in line with the chosen strategy.</small>	
I wish to invest the above outlined contribution in my current, existing fund choice <input type="radio"/>	
or I wish to invest the above outlined contribution in the following fund choice:	
<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>
<small>Please note that fund choice is in respect of the top up amount only.</small>	
<small>Any change to the customer's current investment holding will require a separate instruction.</small>	

company pensions: single premium contributions to company pension arrangements may require a separate funding check. if so, further information may be requested before contributions can be invested.

We are using your Fund Guide for a full list of the funds available.

We are asked to invest contributions in the following fund choice, which will require a completed new source of information form.