

**PLEASE NOTE: IF ANY OF THESE DETAILS ARE MISSING, INVESTMENT WILL BE GIVEN ON  
DATE FINAL REQUIREMENT RECEIVED.**

**Annual Premium top up Quality Checklist – All products**

**Seller Code:** \_\_\_\_\_

**LARC No:** \_\_\_\_\_

- |                               |     |    |
|-------------------------------|-----|----|
| • Revised premium:            | YES | NO |
| • Effective date:             | YES | NO |
| • Fund choice:                | YES | NO |
| • Commission choice:          | YES | NO |
| • Employer / Employee split:  | YES | NO |
| • Is there a switch in funds: | YES | NO |

**If yes to switch in funds please make sure to state which of the following the switch is:**

- 1. Switch future premiums only**
- 2. Switch existing units only**
- 3. Switch existing units and future premiums**

**\* Note if switching units on a company plan we will need written confirmation from the trustees of the scheme**

**These are the current requirements and are subject to change – we reserve the right to ask for further requirements**