

**i** The following documents need to be attached to this application and sent to EuropeWP@seb.ie:  
 - Copy of ID  
 - Proof of address (e.g. copy of utility bill, not older than 6 months)

**A. Policy Structure**

Policy Currency Required  SEK  EUR

**B. Policyholder Details (Please complete ALL fields)**

<b>Policyholder</b>			
1. Surname		2. Forename	
3. Date of Birth dd/mm/yy-nnnnn		4. Town and Country of Birth	
5. Employment status			
<input type="checkbox"/> Employed <input type="checkbox"/> Self-Employed <input type="checkbox"/> Retired <input type="checkbox"/> Student <input type="checkbox"/> Unemployed <input type="checkbox"/> Other _____ If Employed or Self-Employed, please state:			
5(a) Occupation/Position _____		5(b) Name of Firm _____	
5(c) Nature of Industry _____			
6. Address (Residential)			
7. Country of Residence			
8. Country of Tax Residence (please use a separate sheet if more than one)		9. Tax Identification Number (National Insurance Number) (please give reason if none and please use a separate sheet if more than one)	
10. Politically Exposed Person (PEP) Status:			
<input type="checkbox"/> Yes, I am a PEP 10(a) PEP Function (e.g. diplomat) _____			
<input type="checkbox"/> Yes, I am related to/associated with a PEP 10 (b) Relationship to PEP (e.g. Self, Husband, Wife etc.) _____			
<input type="checkbox"/> No PEP status A politically exposed person is a person who holds, or during the past 18 months has held, prominent public functions, or a family member or a known associate of such a person.  <b>If 'Yes' please provide the reasons:</b> (please refer to the Anti Money Laundering Guidelines for examples)			
11. Are you a US citizen?		Yes <input type="checkbox"/> No <input type="checkbox"/>	
Are you a US resident for tax purposes?		Yes <input type="checkbox"/> No <input type="checkbox"/>	
If the answer to either of these questions is <b>Yes</b> , please provide the <b>US Tax Identification Number (TIN)</b>			

**C. Life to be Assured (if different from the Policyholder)**

1. Surname		2. Forename		3. Date of Birth dd/mm/yy-nnnnn		
4. Address (Residential)						
5. Country of Residence						

Ref8012

#### D. Premium Details

Total expected premium during the lifetime of the policy \_\_\_\_\_ (incl. currency)

Regular payments from Occupational Pension?  Yes  No

Total annual expected premium amount: \_\_\_\_\_

Number of years: \_\_\_\_\_

- Note:**
- Regulatory minimum premium is €100k. Note that recommended premium is €250k.
  - If an additional premium comes from a different source other than the occupational pension, or exceeds the amount stated above, SEB Life International will require an Additional Premium application form.
  - If premium exceeds 500 MSEK, form "TL314500\_int Enkel hälsodeklaration" (simple health declaration) needs to accompany this Application.

#### E. Premium payments to Custody in Sweden

**Bank: SEB** **Account holder:**  
**BIC: ESSESS** **SEB Life International**  
SEK - Bankgiro: 5035-8423  
SEK - IBAN: SE115000000058151003235  
EUR - IBAN: SE475000000055658212294

#### Premium payment to Custody in Luxembourg:

**Bank: SEB** **Account holder:**  
**BIC: ESSELULL** **SEB Life International**  
SEK - IBAN: LU870643057825A02752  
EUR - IBAN: LU330643057825A01978

**Note: Please quote "WP" and the Policy number or custody number on all premium payments.**

#### F. Source of Funds and Wealth

What is the source of funds and wealth to be invested? (*more than one box may be ticked*)

- Savings from income  Savings/sale from investments  Sale of property  Sale of business  
 Inheritance  Pension savings  Other \_\_\_\_\_

**Please provide details of the bank account from which this cash premium is being paid**

Payments must be from bank accounts in the Applicant(s)' name(s)

Bank Name

Name of Bank Account Holder

IBAN

BIC/Swift Code

Bank Account Number

Country of bank account

- Notes:**
- If the Premium payment is coming from more than one source, a Source of Funds and Wealth section for each payment source needs to be completed and signed by the Applicant, and should accompany this Application.

#### G. Asset Management details

Please select the management service you require by ticking the appropriate box;

- Discretionary Investment Management Service  
 Advisory Investment Management Service

The investment management service will be carried out in accordance with the agreement, including the discretionary mandate/investment profile if applicable. The investment management fee will increase the operating costs of the insurance and be charged to the insurance capital.

#### H. Registration for Internet Banking for Private clients

- Yes, I request internet banking access through SEB Internet banking for Private Clients, on behalf of SEB Life, to view and trade financial instruments within the custody connected to my Portfolio Bond policy. To be able to use this service I need to have a digipass as well as a signed agreement with SEB to get access to the Internet banking services. SEB Life has the right to revoke my access rights for the service connected to my Portfolio Bond. The agreement is valid until further notice and can be canceled by me with 30 days notice.

## I. Nomination of Beneficiaries

### Nomination of beneficiary upon death of the relevant life assured.

In the event of the death of the relevant life assured, I hereby request that my policy becomes payable to my Nominated Beneficiary listed below:

Only **whole** percentages are acceptable (*must total to 100%*)

	Name	% Share	Relationship to policyholder	Country of Residence	Tax ID / Social Security Number
<b>BENEFICIARY 1</b>					
<b>Address</b>					
<b>BENEFICIARY 2</b>					
<b>Address</b>					
<b>BENEFICIARY 3</b>					
<b>Address</b>					
<b>BENEFICIARY 4</b>					
<b>Address</b>					

Please tick the box if the above beneficiaries are to be made irrevocable

### Beneficiary's marital rights to death benefits

Present or future spouses of beneficiaries have no marital rights, in case of divorce or death, to the death benefit paid out under this Policy, to any assets that have substituted the death benefit, or to returns on the aforementioned benefit or assets.

- Note:**
- SEB Life International will require documentation from an official registry providing evidence of family relations before releasing Policy death benefits.
  - Where the beneficiary is nominated as irrevocable, the Policyholder may not revoke or change the designation, even if the beneficiary has not accepted the nomination. The irrevocable beneficiary shall have no further rights, including in relation to placing a pledge or encumbrance on the Policy, its assignment or encashment. The irrevocable beneficiary has the rights to receive the death benefit as set out in the terms and conditions.
  - In legal disputes the law of Portugal will apply.

## J. Policy fee

I have read and understood the price list for Wealth Portfolio Portugal

## K Data Protection

I/we hereby consent to: (a) SEB Life International holding, processing and using information and Personal Data in the manner outlined in the Privacy Policy; and (b) the processing and use of such information and Personal Data by those persons to whom it is disclosed. If I/we have provided to SEB Life International any information or personal data concerning any party other than me/us, I/we hereby confirm that I/we (i) have provided a copy of the Privacy Policy to them; and (ii) am/are in compliance with all data protection requirements applicable to me/us. If the undersigned is a corporate entity the person(s) signing for same is (are) hereby deemed to represent, warrant and undertake that such person(s) is or are duly authorised to do so.

**Policyholder** Signature

**X**

Print Name

Date dd/mm/yy

**Life Assured** (if different from Policyholder) Signature

**X**

Print Name

Date dd/mm/yy

**L. Policyholder's Declarations**

**I confirm that I:**

1. am the Applicant in respect of which this declaration is being made; I am not resident or ordinarily resident in the Republic of Ireland; and hereby undertake to inform SEB Life International of any change in my country of domicile/residence during the life of the Policy;
2. have received and read the Product Information Notice, Wealth Portfolio Pricing and Policy Conditions and understand the features, operation and fee structure of the Policy, and also the Privacy Policy.
3. have received and read all relevant material (e.g. Permitted Assets and Exchanges Portugal, management rules, prospectus, fund factsheets etc.) relating to the assets selected for the custody account, including details of the risks associated with the assets and I fully understand these materials and accept these risks;
4. understand that SEB Life International has not, nor will SEB Life International provide, any investment advice or make any assessment of the suitability of the individual assets linked to the Policy, nor is SEB Life International responsible for the returns on or performance of the Policy or the assets linked to the Policy;
5. authorise SEB Life International to enter into an investment management agreement subject to the investment manager's fees as stated in the attached fee schedule, and open the account indicated in Section G, and I agree that SEB Life International shall not be liable for any poor performance or mismanagement of this account, or any action or failure to take action on the part of the Asset Manager giving rise to any loss in the value of the account;
6. for myself and my beneficiaries, fully indemnify and reimburse on demand and keep indemnified, SEB Life International against all claims, demands and actions against SEB Life International in respect of such damages as outlined in declaration 5 above, and all costs and expenses regardless of how they arise in respect of the activities and performance of the Asset Manager.
7. understand that the signing of the Application form does not, by itself, give effect to the contract;
8. understand and accept that the SEB Life International insurance product is based on -my stated financial needs, objectives and investment risk profile and would like to proceed with the product chosen;
9. undertake to advise SEB Life International of any material changes to my financial needs, objectives and investment risk profile.

I hereby declare that all details given on this Application Form are true and complete and I understand that this Application will form the basis of any contract with SEB Life International

I have authorised my intermediary to provide SEB Life International with any future information required regarding the policy contemplated by or referred to in this document and SEB Life International may rely on any such information so provided.

I confirm that my insurance distributor, following consultation and agreement with me, has selected and provided information on a limited number of investment options for consideration and that such information was provided to me in good time.

I confirm I have received KID ID                      for the investment options selected.

**Policyholder** Signature

**X**

Print Name

Date dd/mm/yy

**M. Life Assured Declaration (if different from the Policyholder)**

I confirm I understand that (a) I am being proposed as a life to be insured in the Application (b) a Death Benefit may be payable from the contract in the event of my death (c) SEB Life International and others will hold, process and use the information in Section C in the manner described in the Privacy Policy, which I have read and understood.

**Life Assured Signature**

**X**

Print Name

Date dd/mm/yy



This page is only for the Insurance advisor to fill in!

### O. Insurance adviser details

Agency ID ( <i>KURRE</i> )	Sale-ID ( <i>s-number</i> )	Name ( <i>sales person</i> )
Phone number		E-mail

- I confirm that I provided the Applicant with advice regarding this application on or around: \_\_\_\_\_ (dd/mm/yy), while located at my place of business, by:
  - Phone\*
  - E-mail\*
  - In person, in: \_\_\_\_\_ (country)
- I also confirm that I hold the necessary authorisation to advise the Applicant(s) in their country of residence.
- I confirm that the information contained in this form is consistent with the information recorded in the Suitability assessment.
  - \* *NOTE! Directive for Distance Marketing has to be followed when advice is given from a distance.*

Insurance advisor Signature <b>X</b>	Date dd/mm/yy 
Print Name	

### P. Custody account information (to be filled in by advisor)

- PPB/EB Disk (*Discretionary asset management*)
- PPB/EB/RF (*Advisory asset management*)

<b>Custody 1</b>	Custody number:	Cash account number:	AM fee:	Fictitious ID number
<b>Custody 2</b>	Custody number:	Cash account number:	AM fee:	Fictitious ID number
Agency ID ( <i>KURRE</i> )	Asset manager for custody ( <i>Name &amp; S-ID</i> )		Advisor ID for the custody	Clearing nr
E-mail			Phone number	
Policyholder name			Policyholder Social security number           -	

### Q. Other information

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Postal address: SEB Life International, Bloodstone Building, Riverside IV, Sir John Rogerson's Quay, Dublin 2, Ireland.  
 Switchboard: +353 1 487 07 00, E-mail us at: sales@seb.ie  
 SEB Life International Assurance Company Designated Activity Company trading as SEB Life International is regulated by the Central Bank of Ireland. Registered in the Republic of Ireland. Registration number 218391. Registered office: SEB Life International, Bloodstone Building, Riverside IV, Sir John Rogerson's Quay, Dublin 2, Ireland. SEB Life International Assurance Company DAC is duly registered for the pursuit of the life insurance business within the Portuguese territory on a freedom to provide services basis, and is duly registered for such purposes with the Portuguese Insurance Supervisory Authority (Autoridade de Supervisão de Seguros e Fundos de Pensões or "ASF") under number 4862 (ASF - Detalhe da seguradora). SEB Life International Assurance Company DAC carries out its activities in accordance with the principles of legality which are applicable to it in respect of marketing and information to consumers. Holders of policies issued by SEB Life International Assurance Company Designated Activity Company should note that the regulatory system may be different to that of Portugal. Past performance is not a reliable guide to future performance. The value of investments may go down as well as up. All information is correct as at March 2022 but is subject to change.