



Foresight
group

**FORESIGHT
ACCELERATED
INHERITANCE
TAX SOLUTION**

ENCASHMENT FORM

Encashment Checklist

This form can be used to redeem all or part of a holding in the Foresight Accelerated Inheritance Tax Solution (Foresight Accelerated ITS).

The form should be completed and signed by the investor(s).

Before you submit this Encashment Form, please make sure:

- You have completed all sections of the form
- You have confirmed the amount/percentage to be withdrawn in Section 3
- You have signed and dated Section 5 'Declaration'

Once completed, return this form to:

Investor Relations, Foresight Group, The Shard, 32 London Bridge St, London, SE1 9SG

What you need to know

- Full or partial withdrawal requests can be made from this investment at any time
- No exit or dealing fees apply
- Foresight will endeavour to effect withdrawals within 20 business days
- Original documents will be returned to the sender by recorded delivery
- A confirmation letter and Closing Statement (if applicable) will be issued once payment has been made
- During the first two years of your investment, only a full withdrawal will be possible. Please note, this will terminate your cover under the Insurance Policy and you will lose your IHT shelter

Have a question?

We are available and happy to help with any questions that you may have regarding this form. Please get in touch using the details below.



+44 (0)20 3667 8181



investorrelations@foresightgroup.eu

Section 1: INVESTMENT AND INVESTOR DETAILS

Complete the fields below with the original investment and investor(s) details.

Investment Details:

Policy no.:

Investment date:

Investment amount:

Investor 1:

Title: Mr/Mrs/Miss/Ms/Dr/Other (please specify):
Circle as appropriate

Forename(s):

Surname:

Address:

Postcode:

Date of Birth:

- -

Investor 2: (if applicable)

Title: Mr/Mrs/Miss/Ms/Dr/Other (please specify):
Circle as appropriate

Forename(s):

Surname:

Address:

Postcode:

Date of Birth:

- -

Section 2: REASON FOR WITHDRAWING FROM YOUR INVESTMENT:

Section 3: AMOUNT TO BE WITHDRAWN*

- To encash 100% of the investment tick 'Full Withdrawal'
- To redeem part of the Investment tick 'Partial Withdrawal'
- Please specify the amount or percentage to be withdrawn from the most recent available valuation

Note: The value will be determined by the most recent available valuation.*

I/We request to make a:

Full Withdrawal Partial Withdrawal

Please confirm the amount £ _____ or _____ %

***Please contact us for confirmation of the value to be encashed.**

Section 4: HOW/WHERE DO YOU WANT YOUR MONEY PAID?

Please complete the relevant section(s) below. In some cases both sections will apply:

Complete Section 4a and/or Section 4b as applicable, specifying the amount or percentage to be paid.

a) Direct Payment: Recipient 1

To the following bank account:

Account name: _____

Bank/building society: _____

Sort code: - -

Account number:

Please confirm the amount £ _____ or _____ %

b) Direct Payment: Recipient 2 (if applicable)

To the following bank account:

Account name: _____

Bank/building society: _____

Sort code: - -

Account number:

Please confirm the amount £ _____ or _____ %

Section 5: DECLARATION

The investor(s) must read the Declaration below and print and sign their name in the box.

- I/We confirm I/we wish to encash the full amount shown in Section 3 in the Foresight Accelerated ITS;
- I/We confirm I am/we are requesting to make a withdrawal on my/our own behalf;
- I/we confirm that I/we understand that during the first two years of my/our investment, only a full withdrawal will be possible and that this will terminate my/our cover under the Insurance Policy and I/we will lose my/our IHT shelter;
- I/We understand that Foresight will endeavour to effect my/our request within 20 business days;
- I/We confirm that I/we have signed the Encashment Form (if applicable).

SIGNATURE OF INVESTOR 1:

SIGNATURE OF INVESTOR 2: (if applicable)

Print Name:

Print Name:

Date:

Date:

Once the payment has been made, we will send you a payment confirmation letter and a closing statement (if applicable).

Have a question?

We are available and happy to help with any questions that you may have regarding this form. Please get in touch using the details below.

 +44 (0)20 3667 8181

 investorrelations@foresightgroup.eu

Foresight
GROUP

Foresight Group LLP

The Shard
32 London Bridge Street
London
SE1 9SG

foresightgroup.eu