



Illustration request form

Countrywide Assured Onshore Bond

Applicant(s)

No more than 2 individuals or, if held in trust, up to 4 trustees

	First name	Surname
1.		
2.		
3.		
4.		

Trust

Is the Onshore Bond to be written in trust? <i>Type of trust – if applicable</i>	Name of the trust <i>If applicable</i>

Life or lives assured

Up to 6 lives assured

Name	Gender	Date of birth
1.		
2.		
3.		
4.		
5.		
6.		

Death benefit basis

If more than one life assured – first or last death

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Investment

Investment amount <i>Minimum initial investment £50,000 Minimum top-up investment £1,000</i>	Investment platform name	Platform charge* <i>% of fund value</i>

*Platform charges are generally tiered, with the aggregate charge being dependent on the value of other products, which the customer may also have on the platform. If no details are provided, illustrations will use a default platform charge of 0.25% pa.

Financial adviser

Name of firm <i>£ amount or % of investment amount</i>	Initial adviser fee <i>£ or % of investment</i>	Ongoing adviser fee <i>£ or % each year</i>	Frequency
			<input type="checkbox"/> Monthly <input type="checkbox"/> Quarterly

Investment manager

Name of firm <i>If applicable</i>	Investment management fee <i>If applicable</i>

Regular withdrawals

If applicable

Amount <i>£ or % each year</i>	Frequency
	<input type="checkbox"/> Monthly <input type="checkbox"/> Quarterly <input type="checkbox"/> Half-yearly <input type="checkbox"/> Annually

Fund selection[‡]

No more than 10 funds

Fund name	ISIN	OCF	% Proportion
1.			
2.			
3.			
4.			
5.			
6.			
7.			
8.			
9.			
10.			
‡If funds not selected, please provide an indicative Ongoing Charge Figure (OCF) for use in the illustration. If no details are provided, illustrations will use a default fund OCF of 0.50 pa%.			100%

Please email the completed illustration request to newbusiness@countrywide-assured.co.uk

We aim to provide the illustration within 3 working days.