

Sample Template

Title><FirstName><Surname>

<Address Line 1>

<Address Line 2>

<Address Line 3>

<Address Line 4>

Policy Number: <XXXXXXXXXX>

<DD/MM/YYYY>

Important Information about your Irish Life policy

<Dear Salutation,>

As part of our phased withdrawal from the Republic of Ireland, we are writing to you to update you with important information regarding your Irish Life Assurance policy as we prepare to cease our activities as an insurance intermediary. On 13th May 2022, we announced that we have signed a legally binding agreement with Irish Life Assurance PLC (Irish Life) to end our appointment as a tied agent and to transfer our intermediary activities for your policy to Irish Life Financial Services Ltd (ILFS) a subsidiary of Irish Life Group Ltd and a tied agent of Irish Life (the “**Transfer**”).

What does this mean for you?

Your policy is provided by Irish Life and the terms and conditions of your policy are not affected in any way by this change.

You will continue to receive annual correspondence directly from Irish Life in relation to your policy and any policy changes or queries you may have will continue to be serviced and administered by Irish Life until your policy maturity date.

ILFS will be in a position to look after any ongoing or new advice requirements you may have and more details of this will be provided directly to you by ILFS following the transfer date.

We will transfer the personal data that we hold about you relating to the advice given by Ulster Bank to ILFS on 31st July (transfer date) to ensure that they have all the information that they need to provide you with any ongoing or new advice requirements you may have, including, in connection with your Irish Life policy. If you want to object to us transferring this personal data and receiving ongoing advice services including in relation to your policy by ILFS, you can do so by simply emailing financial.planning@ulsterbank.com with your instruction and policy number within 2 months of receiving this letter.

If you do decide to object to this data transfer, it is important to note that any future advice requirements you may require can be provided by a financial advisor of your choice and your Irish Life policy will not be impacted in any way.

We will still hold your personal data after the Transfer where we are required to by law or regulation. Further information can be found by visiting our privacy notice at <https://www.ulsterbank.ie/globals/privacy.html>

<p>Important Note: Your Irish Life policy terms and conditions have not changed and you do not need to take any action as a result of this notification unless you do not wish your personal data to transfer to ILFS and for ILFS to contact you in relation to your ongoing advice requirements.</p>

Need more support?

If you have any questions or would like any more information about what we have explained in this letter, please visit our website www.ulsterbank.ie for a full list of our Frequently Asked Questions. If you have any queries on your existing policy or any other matter relating to your policy, please contact our dedicated team on 0818 210 260 or email us @ financial.planning@ulsterbank.com.

Be fraud aware

The circumstances of Ulster Bank's withdrawal from the market may prompt fraudsters to attempt to take advantage of the situation. We will ensure all security measures continue to keep you protected. Please stay alert, watch out for scams and visit [ulsterbank.ie/security](https://www.ulsterbank.ie/security) for more information and support.

We would like to thank you for your business with us over the years and assure you that we will continue to help and support you through this transition.

Yours sincerely

Simon Falkner
Head of Financial Planning & Private



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