

# Optional travel plan

## Application form for individuals & families

Please complete this form in **BLOCK CAPITALS** using black ink, and return it to us by email or post. You can find our contact details at the end of this form.

### Your personal details

First name: ..... Surname: ..... Title: .....

Address: .....

Mobile number: ..... Surname: .....

Email: ..... Health plan number: .....

### Dependants for whom cover is required

If you have dependants covered under your health plan, please let us know for whom a travel plan is required (e.g. partner, children):

.....

.....

.....

.....

### Beneficiary nomination

The travel plan includes a small amount of personal accident cover. Please nominate your beneficiaries of the travel plan in the event of your death. If you are also applying for a travel plan for one or more of your dependants, they will also need to nominate the beneficiaries of their travel plan in the event of their death. Please complete this section in respect of all dependants for whom a travel plan is required on a separate sheet of paper.

no.	Full name	% of benefit to be paid	Address	Relationship to insured person
1				
2				
3				
4				
5				

If the death of one or more of the beneficiaries named above precedes your own, the proportion of that benefit that otherwise would have been paid to those beneficiaries will be shared between any surviving beneficiaries, in proportion with the percentages specified above. If this is not your wish, or if you would like to nominate any alternative beneficiaries please state your wishes here:

.....

.....

.....

.....

## How we use your information

Please read this section carefully.

- We will use the information that you have given us on this application form for the purposes of administering your plan, processing your claims, identifying and preventing fraud, complying with our legal and regulatory obligations, and carrying out research and statistical analysis to help us improve our services. We will not retain your information for longer than is necessary.
- We may share your information with other organisations in relation to the above purposes, e.g. the insurer of your plan, payment service providers, and our emergency medical assistance service providers. This may involve transferring your information to countries outside the European Union.
- Telephone calls to and from William Russell Ltd. may be recorded for training and monitoring purposes.
- We will process the personal information of each person named on this form, including sensitive information such as details about your/their health, in accordance with our privacy policy.
- Our privacy policy also contains information about who to contact if you have any questions about how we use your information, or if you would like to request a copy of the information we hold about you. For full details of our privacy policy, please visit [william-russell.com/privacy](http://william-russell.com/privacy) or consult your plan agreement.

## Marketing communication preferences

We would like to stay in touch with you in ways we think you might find helpful. Every now and then we would like to share information about the expat lifestyle plus other useful content we think could be of interest to you, like promotions for products and services. These could include being contacted by email or by phone. We won't spam you or share your details with anyone else and you can unsubscribe at any time.

We value your privacy and will never sell your data on to third parties. You can read our full [privacy policy here](#).

Please tick the box to opt into our marketing communications:

- Email
- Newsletter
- Phone
- Text/SMS

## Declaration for your business protection plan

Please read this section carefully and sign below.

- I understand that my application for a travel plan is subject to written acceptance by William Russell Ltd.
- I declare that I have taken reasonable care to answer every question for all persons named on this form fully, accurately, and to the best of my knowledge and belief. I also confirm that I have checked with each person that the information I have provided is a true representation of the facts.
- I understand that misrepresentation could result in claims being rejected or not fully paid, and/or my plan being cancelled.
- In order to process my claims, I understand that William Russell Ltd. may need to obtain details of my medical history and the medical histories of all persons named on this form.
- I authorise William Russell Ltd. to send all insurance documents as PDF files to the email address I have provided on this form. If my employer has applied through a broker or intermediary, I understand that these documents may be sent via email to that broker or intermediary.
- I understand that, upon receipt of my insurance documents, if I am not entirely satisfied, I can cancel my application from inception and receive a full refund of the premium paid, provided I notify William Russell Ltd. within 30 days of the plan start date, and provided no claim has been made.

**Some important notes**

Please make sure that this form and all supplementary documents are legible. Your completed application form is valid for 28 days from the date you signed the form. If cover has not commenced within 28 days, you may have to complete a new form. If the health of any person named on this forms changes after you submit this form but before your plan starts, you must let us know immediately.

Please return this form to us using the contact details below by post or email.

We can accept signed and scanned copies of the form attached to an email as a PDF.

We can also accept a digital version of this form, provided you have typed your name below, and your email contains the following copy: "I, [your name], have signed the form myself, and I am happy to be bound by the terms of the plan/ agreement attached to this email." This needs to be sent from the same email address as stated on your form.

**Name of applicant:** .....

**Signature of applicant:** ..... **Date:** .....