


PR 2021/11A1 - Addendum - Tax consequences for Australian policyholders of a Quilter executive investment bond

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Addendum

Product Ruling

Tax consequences for Australian policyholders of a Quilter executive investment bond

This Addendum is a public ruling for the purposes of the *Taxation Administration Act 1953*. It amends Product Ruling PR 2021/11 to reflect the issuer's change of name and to update the list of documents upon which the scheme that is the subject of this Ruling is identified and described.

PR 2021/11 is amended as follows:

1. Paragraph 3

After '(Quilter)'; insert new footnote A1:

^{A1} On 21 October 2022, Quilter changed its name to Utmost International Isle of Man Limited. From 21 October 2022, all references to 'Quilter' in this Product Ruling should be read to mean 'Utmost International Isle of Man Limited'.

2. Paragraph 17

Omit all dot points; substitute:

- application for a Product Ruling as constituted by information and documentation received on 18 June 2021 and 15 April 2024
- the Executive Investment Bond Policy Terms, effective as of June 2015 and last updated in November 2020 (with reference EIB4) and effective for EIBs entered into on or after 30 September 2019, and
- the Executive Investment Bond Policy Terms (with reference EIB4) effective for EIBs entered into on or after 25 October 2021.

This Addendum applies both before and after its date of issue.

Commissioner of Taxation
24 July 2024

ATO references

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