

## Draft Deed of Assignment of a policy to an existing trust

### Notes to help you

This form is designed to be used where you would like to assign your policy to an existing trust. It is designed to be used with Prudential International products that are to be assigned to an absolute or discretionary trust. If you want to use this Draft Deed with other trusts, you will need to check the Trust Provisions to ensure the trust has the relevant powers.

Prudential International Assurance plc cannot accept responsibility for the use of this form as its suitability depends upon each investor's own individual, separate circumstances. Before considering the use of any part of this form, the investor(s) should discuss matters with their legal professional adviser(s).

This form is divided into sections. **Notes** are provided at the end of each section to help you to complete it. Please ensure you complete ALL sections of the form.

If you have any queries please call 0808 234 2200 (Monday – Friday, 8.30am – 6pm) where an operator will be happy to help. Calls may be monitored or recorded for quality and security purposes.

Please use black ink and write in CAPITAL LETTERS or tick as appropriate. Any corrections must be initialled – do not use correction fluid as this will invalidate your application.

Please send the completed form to: **Prudential International, Stirling, FK9 4UE.**

### Section 1 – Draft Deed of Assignment of policy to an existing trust

This Draft Deed of Assignment of the policy to an existing trust is made on 

D	D	M	M	Y	Y	Y	Y
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*This is the date the last party has signed this form.*

by<sup>1</sup>

First assignor

and

Second assignor if any

and<sup>2</sup>

First trustee

and

Second trustee

#### Notes

<sup>1</sup> Please give the full names and addresses of the owners who wish to assign the policy (assignor).

<sup>2</sup> Please give the full names, addresses and dates of birth of the trustees, including the assignor if also a trustee.

### Section 2 – Additional information

This Draft Deed is supplemental to a Declaration of Trust made by:<sup>3</sup>

On

D	D	M	M	Y	Y	Y	Y
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The assignor is the policyholder of the following policy (give policy number)

*issued by Prudential International Assurance.*

#### Notes

<sup>3</sup> Please give the full names of those who created the trust and the date the trust was established.



## Section 4 – Declaration and signatures<sup>4, 5</sup>

### The parties to this Draft Deed declare as follows:

The assignor irrevocably assigns and conveys the policy and all benefits and monies payable under it to the trustees to hold for the purposes and subject to the powers and provisions of the existing trust so far as the same are now subsisting and capable of taking effect. The trustees accept the assignment as evidenced by their signature to this Draft Deed.

<b>1. Name of first assignor</b> <input type="text"/>	Signature <input type="text"/>
In the presence of: <i>name of witness</i> <input type="text"/>	<b>Witness address</b> <input type="text"/>
<b>Witness signature</b> <input type="text"/>	<input type="text"/>

<b>2. Name of second assignor</b> <input type="text"/>	Signature <input type="text"/>
In the presence of: <i>name of witness</i> <input type="text"/>	<b>Witness address</b> <input type="text"/>
<b>Witness signature</b> <input type="text"/>	<input type="text"/>

<b>3. Name of first trustee</b> <input type="text"/>	Signature <input type="text"/>
In the presence of: <i>name of witness</i> <input type="text"/>	<b>Witness address</b> <input type="text"/>
<b>Witness signature</b> <input type="text"/>	<input type="text"/>

<b>4. Name of second trustee (if applicable)</b> <input type="text"/>	Signature <input type="text"/>
In the presence of: <i>name of witness</i> <input type="text"/>	<b>Witness address</b> <input type="text"/>
<b>Witness signature</b> <input type="text"/>	<input type="text"/>

- Notes**
- 4** All **assignors and trustees** must sign this Draft Deed and have their signatures witnessed. **Witnesses must** be over 18 and independent of the trust.
- 5** If there are more than two assignors or trustees, please photocopy this page, complete and send it in with this form.

