

# Deed of Assignment

## Notes to help you

To change the legal ownership of a life assurance policy by way of gift only (gift assignment from single assignor to single assignee).

Please use black ink and write in CAPITAL LETTERS or tick  as appropriate.

### Important:

This deed is for the consideration of solicitors acting for the assignor/assignee. It should only be used after independent professional advice has been taken. Prudential International cannot accept any responsibility for its use. If it is not suitable for use in its present form a separate deed should be drawn up to cover the precise needs of the assignor/assignee.

### This form should not be amended in any way.

- › If regular withdrawals are being taken from a bond any change to ownership will result in the suspension of such payments until we receive a written request from the new owner for them to resume, or for a new regular withdrawal arrangement to be set up.
- › The assignment includes no guarantee of the assignor's title to the policy. If such a guarantee is intended or required to be given, legal advice should be sought.
- › Independent advice should be sought from a solicitor, financial advisor or accountant on the tax implications of the assignment of a life policy.
- › This form is not suitable for use by an executor or a trustee.
- › This form cannot be used for an assignment to a minor.
- › This form cannot be used to implement a financial arrangement ordered or approved by a court.

Please refer to the information above, before considering the use of this assignment wording.

## Section 1 – Deed of assignment (assignment from single assignor to single assignee)

This Deed of Assignment is made the  day of  20

between  of

(hereinafter called "the Assignor") of the one part.

and  of

(hereinafter called "the Assignee") of the other part.

### Whereas

1. The Assignor effected with Prudential International Assurance plc the following policy or policies of assurance, namely:

Policy(ies) number(ed)	Dated (commencement date)	On the life/lives of
<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>

(hereinafter called "the Policy").

2. The Assignor desires to assign to the Assignee the said Policy by way of gift.

## Section 1 – Deed of assignment – continued

### Now this deed witnesseth as follows:

1. The Assignor hereby assigns unto the Assignee the Policy and all monies receivable thereunder and all benefits secured thereby to hold the same unto the Assignee and his/her executors, administrators and assigns absolutely.

**In witness** whereof the parties hereto have set their hands the day and year first above written.

Signed and delivered as a deed (signature of Assignor)

X

Date

D	D	M	M	Y	Y	Y	Y
---	---	---	---	---	---	---	---

By the above named (print name of Assignor)

In the presence of (signature of witness)

X

Date

D	D	M	M	Y	Y	Y	Y
---	---	---	---	---	---	---	---

Print name and address of witness

Postcode

Signed and delivered as a deed (signature of Assignee)

X

Date

D	D	M	M	Y	Y	Y	Y
---	---	---	---	---	---	---	---

By the above named (print name of Assignee)

In the presence of (signature of witness)

X

Date

D	D	M	M	Y	Y	Y	Y
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Print name and address of witness

Postcode



## Section 3 – Intermediary Introduction Certificate for Investment Business

Name of assignee (in full)

Date of birth

D	D	M	M	Y	Y	Y	Y
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Address

	Postcode

**I/We certify that**

*Please tick relevant box*

I/We have verified the identity of the assignee and:

(a) \* certified copies of the underlying documentary evidence received are enclosed

**OR**

(b) \* type of ID provided:

Ref No

Expiration date

D	D	M	M	Y	Y	Y	Y
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Type of address verification provided:

Ref No (where applicable)

Date of issue

D	D	M	M	Y	Y	Y	Y
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\* Please delete as appropriate

Adviser name

Adviser Ref No

Tel number

Fax number

E-mail address

Address

	Postcode

[www.pru.co.uk/international](http://www.pru.co.uk/international)

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