Pru
part of M&G plc

Deed of Assignment

Gift Assignment

About this form

To change the legal ownership of a life assurance or capital redemption policy by way of gift only (gift assignment from joint assignors 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 assignors/assignee. It should only be used after independent professional advice has been taken. Prudential International Assurance plc, UK Branch, 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 assignors/assignee.

This form should not be amended in any way.

- If we are deducting regular withdrawals, Ongoing Adviser Charges or other deductions we can be authorised to make and pay from a bond, any change in ownership will result in the suspension of such transactions until we receive a request in writing (or such other format that we may agree to at the time) from the new owner for them to resume, or for a new arrangement to be set up.
- The assignment includes no guarantee of the assignors' 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 a Personal Representative, 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.

How we use your personal information

For the **Prudential Onshore Portfolio Bond** – For a copy of our latest Data Protection Notice, please visit **www.pru.co.uk/mydata-piaon**

This details how and why we use your personal information (including any sensitive personal information), who we may share it with and your rights around your personal information.

Alternatively, you can request a copy to be sent to you by writing to **The Data Protection Officer, Customer Service Centre, Lancing BN15 8GB**.

Please note that we collect personal information from you that is necessary for us to either provide you with the product or service you've requested or to comply with statutory or contractual requirements.

Unfortunately, if you don't provide all of the information we require this may mean we are unable to provide our products and services to you.

Deed of assignment – (assignment from joint assignors to single assignee)

Important Note

Where your bond has a number of separate identical policies (individual segments) and the assignment is to relate to only one or more policies, not the whole bond, please show only the policies to be assigned. For example, if you record 123456A 001 this will result in only one policy (001) being assigned. If you show 123456A 001 – 010 will result in 10 policies (001-010) being assigned. If the assignment is for the whole bond, please record the full bond/plan number for example 123456A 001 – 100. Please contact us first if you are unsure how many policies you have left in your bond.

This Deed of Assignment is made the _____ day of _____ 20 ____

between _____ of _____

and _____ of _____

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

and _____ of _____

(hereinafter called "the Assignee") of the other part. Date of birth D D M M Y Y Y Y

Whereas

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

Policy(ies) Number(ed)	Dated (Commencement Date)	On the life/lives of

(hereinafter called "the Policy").

2. The Assignors desire to assign to the Assignee the said Policy by way of gift.

Absolute Deed of Assignment:

1. With this Deed, the Assignors assign the Policy described above and all due money and benefits receivable from it to the Assignee and his/her executors and administrators.

Executed as a Deed in the presence of the Witness on the day and year mentioned above.

Signed and delivered as a deed (Signature of First Assignor) Date D D M M Y Y Y Y

By the above named (Print name of First Assignor)

In the Presence of (Signature of Witness) Date D D M M Y Y Y Y

Print Name and Address of Witness

Postcode

Deed of assignment – (assignment from joint assignors to single assignee) – continued

Signed and delivered as a deed (Signature of Second Assignor)

Date

D D M M Y Y Y Y

By the above named (Print name of Second Assignor)

In the Presence of (Signature of Witness)

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)

Date

D D M M Y Y Y Y

By the above named (Print name of Assignee)

In the Presence of (Signature of Witness)

Date

D D M M Y Y Y Y

Print Name and Address of Witness

Postcode

www.pru.co.uk

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