



# Deed of 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 single assignor to joint assignees).**

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/assignees. It should only be used after independent professional advice has been taken. Prudential 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/assignees.

**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 owners for them to resume, or for a new 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. **In particular, the assignment of a regular premium policy may affect its tax status.**
- › 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 or minors.
- › 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 **International Portfolio Bond – Lives Assured or Capital Redemption** – to understand how and why we use your personal information (including any sensitive personal information) that we collect from you, who we may share it with and your rights around your personal information you can review a copy of our Privacy Notice [www.pru.co.uk/pdf/GENM489701.pdf](http://www.pru.co.uk/pdf/GENM489701.pdf).

For other **Prudential International products** – for a copy of our latest Privacy Fair Collection Notice, please visit [www.prudential-international.com/en/mydata-privacyfaircollectionnotice/](http://www.prudential-international.com/en/mydata-privacyfaircollectionnotice/).

For the **Prudential Onshore Portfolio Bond and UK products** – for a copy of our latest Data Protection Notice, please visit [www.pru.co.uk/mydata](http://www.pru.co.uk/mydata). 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.

### All products

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 only collect personal information from you that is necessary to provide you with the product or service you have requested. So while we will not use your personal information for all of the purposes set out in our Privacy Notices, we may need to use it, for example, to contact you further about your request or for legal or regulatory purposes.

## Deed of assignment – (assignment from single assignor to joint assignees)

### Important Note

Where your bond/plan 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/plan, please record only the policies to be assigned within the Policy(ies) Number(ed) section below. If for example you record 123456A 000 this will result in only one policy being assigned. 123456A 000 – 009 will result in 10 policies being assigned. If the assignment is for the whole bond/plan, please record the full bond/plan number for example 123456A 000 – 019. For International Portfolio Bond only – if you wish to assign one or more policies in a bond (i.e. not the whole bond), please state the bond number and how many policies, within that bond, you wish to assign.

This Deed of Assignment is made the  day of  20

between  of

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

and  of

Date of birth

and  of

(hereinafter called "the Assignees") of the other part. Date of birth

### Whereas

1. The Assignor effected with The Prudential Assurance Company Limited, and/or one or more of the other companies within M&G plc, 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 Assignor desires to assign the said Policy by way of gift into the joint ownership of the Assignees.

### Now this deed witnesseth as follows:

1. The Assignor hereby assigns the Policy and all moneys receivable thereunder and all benefits secured thereby to the Assignees jointly and to the survivor of them and to 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)

Date

By the above named (Print name of Assignor)

In the Presence of (Signature of Witness)

Date

Print Name and Address of Witness

Postcode

Deed of assignment – (assignment from single assignor to joint assignees) – continued

Signed and delivered as a deed (Signature of Assignee)

X

Date

D	D	M	M	Y	Y	Y	Y
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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

Signed and delivered as a deed (Signature of Assignee)

X

Date

D	D	M	M	Y	Y	Y	Y
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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



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