

# Draft Deed of Assignment of a Policy to an Existing Trust

## How to fill out this form

Please use black ink and CAPITAL LETTERS or tick  as necessary.

Any corrections must be initialled; do not use correction fluid.

Please give the full name(s) and address(es) of the owners who wish to assign the policy (Assignor).

Please give the full name(s), address(es) and dates of birth of the Trustees, including the Assignor if also a Trustee in the boxes opposite.

Please give the full name(s) of those who created the Trust and the date the Trust was established.

Please provide the policy number.

## About this form

This form is designed to be used where you would like to assign your Policy to an Existing Trust.

This form is designed to be used with our Onshore Investments written under an absolute or discretionary Trust. If you want to use this Draft Deed with other Trusts, you'll need to check the Trust Provisions to ensure the Trust has the relevant powers.

**Important note:** This form **should not** be used for a qualifying life policy before the investor(s) has/have discussed its suitability and possible tax impact with their tax adviser(s).

The Prudential Assurance Company Limited and Prudential International Assurance plc, UK Branch, 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).

Please send this form to:  
**Prudential, Lancing BN15 8GB**

For Prudential Onshore Portfolio Bond, please send this form to: **Prudential International Assurance plc, 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 made on

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

This is the date the last party has signed this form.

by

(First Assignor)

and

(Second Assignor if any)

and

(First Trustee)

and

(Second Trustee)

## Section 2 – Additional information

This Draft Deed is supplemental to a Declaration of Trust made by:

On

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

The Assignor(s) is/are the policyholder(s) of the following Policy

issued by Prudential Assurance Company, and/or one or more of the other companies within the M&G plc Group.

## Section 3 – Declaration and signatures

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.

All Assignors and Trustees must sign this Draft Deed and have their signatures witnessed.

Witnesses must be over 18 and independent of the Trust.

|                                     |                      |
|-------------------------------------|----------------------|
| <b>1. Name of First Assignor</b>    | Signature            |
| <input type="text"/>                | <input type="text"/> |
| In the presence of: Name of Witness | Witness address      |
| <input type="text"/>                | <input type="text"/> |
| Witness signature                   | <input type="text"/> |
| <input type="text"/>                | <input type="text"/> |

|                                     |                      |
|-------------------------------------|----------------------|
| <b>2. Name of Second Assignor</b>   | Signature            |
| <input type="text"/>                | <input type="text"/> |
| In the presence of: Name of Witness | Witness address      |
| <input type="text"/>                | <input type="text"/> |
| Witness signature                   | <input type="text"/> |
| <input type="text"/>                | <input type="text"/> |

|                                     |                      |
|-------------------------------------|----------------------|
| <b>3. Name of First Trustee</b>     | Signature            |
| <input type="text"/>                | <input type="text"/> |
| In the presence of: Name of Witness | Witness address      |
| <input type="text"/>                | <input type="text"/> |
| Witness signature                   | <input type="text"/> |
| <input type="text"/>                | <input type="text"/> |

|                                     |                      |
|-------------------------------------|----------------------|
| <b>4. Name of Second Trustee</b>    | Signature            |
| <input type="text"/>                | <input type="text"/> |
| In the presence of: Name of Witness | Witness address      |
| <input type="text"/>                | <input type="text"/> |
| Witness signature                   | <input type="text"/> |
| <input type="text"/>                | <input type="text"/> |

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

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