

Deed of Assignment

How to fill out this form

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

About this form

To change the legal ownership of a life assurance policy implementing a financial arrangement as ordered or approved by a court on judicial separation, divorce or dissolution of a marriage or civil partnership (assignment from joint assignors to single assignee).

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 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 regular withdrawals and Ongoing Adviser Charges are being taken from a bond any change in 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 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. In particular, the assignment of a qualifying 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.

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

How we use your personal information

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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/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.

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
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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
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Print Name and Address of Witness

<input type="text"/>	
<input type="text"/>	
<input type="text"/>	Postcode

Signed and delivered as a deed (Signature of Assignee)

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)

Date

D	D	M	M	Y	Y	Y	Y
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Print Name and Address of Witness

<input type="text"/>	
<input type="text"/>	
<input type="text"/>	Postcode

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