

Draft Deed of Assignment to Beneficiaries

How to fill out this form

Please use **black ink** and write in CAPITAL LETTERS. Any mistakes must be crossed through and any changes initialled. Please do not use correction fluid as this will invalidate your application.

Please give the full names and addresses of all Trustees.

Please give the full name, address and date of birth for the assignee – i.e the beneficiary.

Please give the full names of those who created the Trust and the date the Trust was established.

Please insert the policy number(s) and/or segment number(s) to be assigned in the box opposite.

About this form

This form is designed to be used where the Trustees wish to assign a Policy to a Beneficiary.

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 will need to check the Trust Provisions to ensure the Trust has the relevant powers.

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 to Beneficiaries

This Draft Deed of Assignment to Beneficiaries is made on

D	D	M	M	Y	Y	Y	Y
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This is the date the last party has signed this form.

by

1st Trustee

2nd Trustee

3rd Trustee

4th Trustee

and

Assignee

Date of Birth

D	D	M	M	Y	Y	Y	Y
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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
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The Trustees wish to irrevocably assign the following policy/segment(s) issued by Prudential Assurance Company, and/or one or more of the other companies within the M&G plc Group and all benefits thereunder to the Assignee:

Section 3 – Declaration and signatures

The parties to this Draft Deed declare as follows:

- The Trustees are the owners of the Policy, as Trustees under the Trust.
- The Trustees have the power under the Trust to assign the Policy to the Assignee.
- The Trustees hereby and irrevocably assign and convey the Policy and all monies assured thereby and all benefits and other monies which may become payable in respect thereof to the Assignee.
- Such assignment shall discharge the Trustees' obligations in accordance with the terms of the Trust.

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

1. Name of 1st Trustee

Signature

In the presence of: Name of Witness

Witness signature

Witness address

2. Name of first 2nd Trustee

Signature

In the presence of: Name of Witness

Witness signature

Witness address

Witnesses must be over 18 and independent of the Trust.

3. Name of 3rd Trustee

Signature

In the presence of: Name of Witness

Witness signature

Witness address

Section 3 – Declaration and signatures – continued

4. Name of 4th Trustee

Signature

In the presence of: **Name of Witness**

Witness address

Witness signature

5. Name of Assignee

Signature

In the presence of: **Name of Witness**

Witness address

Witness signature

pru.co.uk

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