

Draft Deed of Assignment to Beneficiaries

Notes to help you

Please use black ink and write in CAPITAL LETTERS or tick as appropriate.

Any corrections must be initialled. Please do not use correction fluid as this will invalidate your application.

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

This form is designed to be used with our Offshore 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 make sure the Trust has the relevant powers.

Prudential International Assurance plc can't 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).

For **International Portfolio Bond**, please send this form to: **Prudential International, PO Box 5177, Worthing BN11 9HJ.**

For all **other Prudential International products**, please send this form to: **Prudential International, 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

Please give the full names and addresses of all Trustees

1st Trustee

2nd Trustee

3rd Trustee

4th Trustee

and

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

Assignee

Date of Birth

D	D	M	M	Y	Y	Y	Y
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Section 2 – Additional information

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

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

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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 International, and all benefits thereunder to the Assignee*:

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*Please insert the policy/segment(s) to be assigned in the box above.

Section 3 – Declaration and signatures

The parties to this Draft Deed declare as follows:

- › The Trustees are the owners of the Policy/Policies, as Trustees under the Trust.
- › The Trustees have the power under the Trust to assign the Policy/Segment(s) to the Assignee.
- › The Trustees hereby and irrevocably assign and convey the Policy/Segment(s) 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. **Witnesses must** be over 18 and independent of the Trust.

1. Name of 1st Trustee

In the presence of: *Name of Witness*

Witness signature

Signature

Witness address

2. Name of 2nd Trustee

In the presence of: *Name of Witness*

Witness signature

Signature

Witness address

3. Name of 3rd Trustee

In the presence of: *Name of Witness*

Witness signature

Signature

Witness address

4. Name of 4th Trustee

In the presence of: *Name of Witness*

Witness signature

Signature

Witness address

5. Name of Assignee

In the presence of: *Name of Witness*

Witness signature

Signature

Witness address

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