

Deferral of Sub-trust Fund Entitlement on the Aviva Flexible Reversionary Trust



This form is used by the settlor (the person who set up the trust) to request a change to the vesting date for certain segments (sub-trust funds) within their Aviva Flexible Reversionary Trust.

By completing this form, you are asking the trustees to defer when you (or the beneficiary) will become entitled to the specified segments. Only segments with a vesting date after the date of this form can be amended.

Once completed, this form should be retained by the trustees, with the original Reversionary Trust Deed, as evidence of this amendment.

Letter to trustees

To the trustees of

Trust name

Bond account number

A	V									-			
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Today's date

D	D	M	M	Y	Y	Y	Y
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Settlor's name

Date of trust

D	D	M	M	Y	Y	Y	Y
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Section 2 - Settlor Declaration

I request that the vesting date(s) for the segment(s) listed in Section 1 be deferred as indicated. I understand that only segments with a vesting date after the date of this form can be amended, and that the **trustees may override or decline this request if they consider it appropriate.**

Settlor's name

Settlor's signature

Date

D	D	M	M	Y	Y	Y	Y
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Section 3 - Trustees acknowledgment

We, the trustees, acknowledge receipt of this form and accept the amendment proposed in Section 1

(Fill in the boxes below for up to four trustees)

First trustee name

Signature

Date

D	D	M	M	Y	Y	Y	Y
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Second trustee name

Signature

Date

D	D	M	M	Y	Y	Y	Y
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Third trustee name

Signature

Date

D	D	M	M	Y	Y	Y	Y
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Fourth trustee name

Signature

Date

D	D	M	M	Y	Y	Y	Y
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Aviva Life & Pensions UK Limited.

Registered in England and Wales No 3253947. Aviva, Wellington Row, York, YO90 1WR.

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