

Deed Adding Potential Beneficiaries



General notes

Advice

If you have any doubts about the tax consequences of this deed or any other aspect of it, you should seek advice from your own adviser, for example your financial adviser or solicitor.

Completing this deed

Please complete this deed in ink. Please use block capitals (except for signatures) and always give full names. Please do not use correction fluid.

Witnesses

Each person's signature **must** be witnessed by an independent adult.

Deletions

All deletions and amendments to this Deed **must** be initialled by all the parties completing this Deed.

Your Personal Information

We have used your Personal Information to register your interest in the aforementioned plan, we will continue to use this information in order to comply with any Court Order. If you would like more information about how we use and process Personal Information and your rights in relation to it, you can find further detail in our full privacy policy at aviva.co.uk/privacypolicy or request a copy by writing to us at: The Data Protection Team, Aviva, PO Box 7684, Pitheavlis, Perth PH2 1JR.

Trust Registration

As your policy is written into a trust, there may be an action to register the trust with HMRC. Registration is the trustee's responsibility. As part of our checks, we may ask to see evidence that this has been done. If you can't show us proof, this may delay your policy being processed.

You can find more information about the Trust Registration Service on the Government website. If you're unsure about what you need to do, you should speak to a legal or financial adviser.

Notes to complete this deed

1. Date

Insert the date on which the deed is completed. Do **not** back-date or forward-date this deed.

2. Policy

Insert the policy number.

3. Company

Insert the name of the company shown on the policy document.

4. Clause 2

Delete whichever of the alternative statements in Clause 2 does not apply in your circumstances. In making your decision as to which clause is relevant you should refer to the trust provisions which are contained in the Trust Document applicable to this life policy. The appropriate deletion must then be initialled by all parties completing this Deed.

5. Settlor

Insert the signature, full name and address of the settlor.

6. Trustee

Insert the signature, full name and address of each person who is a trustee of the trust.

7. Schedule of Nominee(s)

Insert the full name(s) of those persons who are to be added as potential beneficiaries of the trust

After completing this deed

This deed and a copy of the trust provisions **must** be sent immediately to Aviva so that the changes made by this deed can be recorded. A copy of this deed should be kept by the trustees for record purposes.

Every effort has been taken to ensure that the form of this deed and the related printed documentation are legally sound but Aviva and its representatives cannot accept any legal responsibility for error or loss however caused.

Deed adding potential beneficiaries

THIS DEED OF NOMINATION is made the day of 20

Whereas

1. Policy numbered was issued by *

and is held by the Trustees upon the trusts ('the Trust') a copy of which is attached to this Deed.

* Insert the name of the company shown on the policy document

- 2. (a) the provisions of the Trust enable the Trustees to nominate any person as a person in whose favour any appointment of a beneficial interest may be made provided such nomination is made during the life of the Settlor and provided also that such nomination has the Settlor's approval.**
- (b) the provisions of the Trust enable the Settlor to nominate any person as a person in whose favour any appointment of beneficial interest may be made provided such nomination is made prior to the Vesting Date of the Trust.**

3. The Trustees/Settlor now wish(es) to exercise his/their power of nomination as set out in this Deed.

Accordingly as relevant

- A. The Trustees nominate the person or persons named in the Schedule of Nominee(s) as a person or persons in whose favour an appointment of beneficial interest may be made under the provisions of the Trust so that the person or persons so named shall be deemed to be included within the range of potential beneficiaries currently specified under the terms of the Trust.
- B. The Settlor irrevocably consents to the nomination under Clause A above.
- C. The Settlor nominates the person or persons named in the Schedule of Nominee(s) as a person in whose favour an appointment of beneficial interest may be made under the provisions of the Trust so that the person or persons so named shall be deemed to be included within the definition of potential beneficiaries under the Trust.
- D. The Trustees acknowledge the Settlor's nomination made under Clause C above.
- E. Subject to those matters dealt with by this deed, the Trust continues to apply.

In this deed the singular includes the plural and the masculine includes the feminine (and vice versa) where the context so admits.

Schedule of Nominee(s)

Full Name

Address (please include post code)

In witness the trustees and the settlor have set their hands to this deed on the day and year mentioned above.

Signed and Delivered by the settlor (also as trustee where appropriate)
Signature
Full name and address (block capitals)

In the presence of:
Witness's signature
Full name and address (block capitals)

Signed and Delivered by the settlor (also as trustee where appropriate)
Signature
Full name and address (block capitals)

In the presence of:
Witness's signature
Full name and address (block capitals)

Signed and Delivered by the Trustee
Signature
Full name and address (block capitals)

In the presence of:
Witness's signature
Full name and address (block capitals)

Signed and Delivered by the Trustee
Signature
Full name and address (block capitals)

In the presence of:
Witness's signature
Full name and address (block capitals)

Signed and Delivered by the Trustee
Signature
Full name and address (block capitals)

In the presence of:
Witness's signature
Full name and address (block capitals)

| Retirement | **Investments** | Insurance | Health |

Aviva Life & Pensions UK Limited. Registered in England No 3253947. Aviva, Wellington Row, York, YO90 1WR. Authorised by the Prudential Regulation Authority and regulated by the Financial Conduct Authority and the Prudential Regulation Authority. Firm Reference Number 185896.

[aviva.co.uk](https://www.aviva.co.uk)

IN90013 03/2024 © Aviva plc

