

# Expression of Wish to the Trustees



## Notes for completion

Before completing this Expression of Wish we recommend you seek advice from your legal and financial advisers to ensure it is suitable for your Aviva discretionary trust.

This form is for use by persons who have created an Aviva discretionary trust.

It is only intended to be used for one of the following discretionary trusts:

**Aviva Discretionary Gift Trust (Protection)**

**Aviva Discretionary Gift Trust (Investment)**

**Aviva Discretionary Discounted Gift Trust**

**Aviva Discretionary Loan Trust**

This Expression of Wish can be used to make known to the Trustees your wishes about whom you would like to benefit from the Trust.

The Trustees will still have freedom to decide who amongst the potential beneficiaries is to benefit from the Trust, although they may wish to consider the Expression of Wish before making any decision about benefits.

**Every effort has been taken to ensure that this Expression of Wish is legally sound, but Aviva and its representatives cannot accept any legal responsibility for error or loss however caused.**

## Trust Registration

As your policy is written into a trust, there may be an action to register the trust with HM Revenue and Customs. 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.

## Expression of Wish to the Trustees

Date 

D	D	M	M	Y	Y	Y	Y
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I/we [name/s]

of [address]

### ("the Settlor/Settlers")

am/are the person/persons who created an

- Aviva Discretionary Gift Trust (Protection)
- Aviva Discretionary Gift Trust (Investment)
- Aviva Discretionary Discounted Gift Trust
- Aviva Discretionary Loan Trust

tick the appropriate one ("the Trust")

Date of trust 

D	D	M	M	Y	Y	Y	Y
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In this Expression of Wish I/we desire to make known to you the Trustees my/our wishes about whom I/we would like you to consider should benefit from the Trust.

I/we understand that this Expression of Wish is not binding on the Trustees and the Trustees will still have freedom to decide who amongst the class of Potential Beneficiaries (as defined in the Trust) is to benefit from the Trust, although they may wish to consider the Expression of Wish below before making any decision about benefits:

name/s and address/es of the beneficiaries	% share if applicable This should add up to 100%
<input type="text"/>	<input type="text"/>

Should any of the above persons not already be included in the class of Potential Beneficiaries and as I am/we are empowered by the Trust to nominate in writing any person or charity (other than a Settlor) to the Trustees to be a Potential Beneficiary I/we also nominate the above person/s and/or charity/ies to be new Potential Beneficiaries of the Trust.

Signed by me/us as Settlor/s of the Trust

