

Deed of Assignment



GENERAL NOTES

Advice

You should seek advice from your own legal and financial advisers to make sure that this deed is right for you. You should do this before completing this deed.

You should not use this deed if you wish to sell the policy to a buyer or mortgage it to a lender.

If you're a trustee and want to assign the policy to a beneficiary:

- please check if there is a power of appointment in the trust (eg a Flexible Gift Trust or a Discretionary Gift Trust)
- and if there is, you need to complete a Deed of Appointment of Beneficiary on an irrevocable basis first.

Completing this Deed

Please complete this deed in writing. Please use block capitals (except for signatures) and always give full names.

Please don't use correction fluid.

Witnesses and Customer Security

Each person's signature must be witnessed by an independent adult (ie not a party to the deed).

In the interests of customer security, Aviva reserves the right to:

- contact customers and their witnesses, and
- to verify the identities, signatures and/or addresses of any parties to this deed.

If you don't provide full contact details the registration of this deed could be delayed.

Deletions

If you make a deletion on the deed, you need to do it before the deed has been signed. You must make sure that each deletion has been initialled by all the signatories.

Tax Residence Self Certification

This form has been designed for use with a protection policy with no investment element. As a result no Tax Residence Self Certification Form is needed.

Your Personal Information

We collect and use your Personal Information as part of this assignment process. 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](https://www.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.

What if the policy is being transferred to someone else?

We'll automatically remove any financial adviser associated with the policy. We'll need confirmation from the new policyholders to either:

- keep the existing financial adviser, or
- appoint a new one.

NOTES TO COMPLETE THIS DEED

To help make it easier to complete this Deed, we've listed notes below and added instruction notes on the deed itself. These are for guidance only and don't form part of the Deed.

- 1. Date** Insert the date on which the deed is completed. Do **not** backdate or forward-date this deed.
- 2. Policy** Insert the policy number.
- 3. Insurance Company** Insert the name of the Insurance Company shown on the policy document.
- 4. Clause 3** Tick one box only. This will identify the reason for the assignment.
- 5. Schedule of New Policy Owner(s)** Insert the full name(s), address(es) and contact details of all those persons to whom the Present Policy Owner is assigning the policy. This includes all new owners and any present policy owners who will continue to own the policy with them.
- 6. Present Policy Owner** Each person who currently owns the policy should sign and insert their full name, address and contact details in the presence of a witness who should also sign and insert their full name, address and contact details. The New Policy Owners should also sign in the relevant box.

After completing this Deed

This deed, or a copy, **must** be sent immediately to Aviva so that the changes made by it can be recorded. If you send us the original deed, we'll return it to you once the changes have been recorded. The original deed should be held in a safe place with the policy document.

We've made every effort to make this form, and any related documentation, legally sound. Aviva, and it's representatives, cannot accept any legal responsibility for error or loss however caused.

THIS DEED OF ASSIGNMENT

is made on (See note 1.)

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

1. Policy numbered was issued by (See note 2.) (See note 3.)

Insert the policy number then the name of the Insurance Company shown on the policy document.

2. BY THIS DEED the Present Policy Owner (whose name and signature appear below) ASSIGNS the Policy described above to the New Policy Owner named in the Schedule of New Policy Owner(s) absolutely

3. By ticking one of the boxes below the Present Policy Owner confirms that this assignment is made

- As part of a divorce, annulment or separation agreement
- By way of a gift, in consideration of natural love and affection
- By the trustee of a Trust in favour of the beneficiary
- By the executor/trustee of a Will in favour of the beneficiary

Tick one box only. This will identify the reason for the assignment.

4. In this deed the singular includes the plural the masculine includes the feminine (and vice versa)

Schedule of New Policy Owner(s) (See note 5.)

		Telephone Number(s) (Please include the full code and any extensions)
Full Name	Address (please include Post Code)	

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Insert the full name(s), address(es) and contact details of all those persons to whom the Present Policy Owner is assigning the policy. This includes all new owners and any present policy owners who will continue to own the policy with them.

IN WITNESS the Present Policy Owner has executed and delivered this deed on the day and year mentioned above. (See note 6.)

Signed and Delivered by the Present Policy Owner

Signature

Full name and address
(block capitals)

Telephone Number(s)
(Please include the full code and any extensions)

--

In the presence of:

Witness' signature

Full name and address
(block capitals)

Telephone Number(s)
(Please include the full code and any extensions)

--

Each person who currently owns the policy should sign and insert their full name, address and contact details in the presence of a witness who should also sign and insert their full name, address and contact details. The New Policy Owners should also sign in the relevant box.

Signed and Delivered by the Present Policy Owner

Signature

Full name and address
(block capitals)

Telephone Number(s)
(Please include the full code and any extensions)

--

In the presence of:

Witness' signature

Full name and address
(block capitals)

Telephone Number(s)
(Please include the full code and any extensions)

--

Signed and Delivered by the Present Policy Owner		In the presence of:	
Signature		Witness' signature	
Full name and address (block capitals)		Full name and address (block capitals)	
Telephone Number(s) (Please include the full code and any extensions)		Telephone Number(s) (Please include the full code and any extensions)	
Signed and Delivered by the Present Policy Owner		In the presence of:	
Signature		Witness' signature	
Full name and address (block capitals)		Full name and address (block capitals)	
Telephone Number(s) (Please include the full code and any extensions)		Telephone Number(s) (Please include the full code and any extensions)	

New Policy Owner(s) sign here

