

Expression of wishes to the Trustees



Important information

Before completing this Expression of wishes, we recommend you seek advice from your legal and financial advisers. This is necessary to ensure it's suitable for your Aviva Discretionary Gift Trust.

You can only use this form if you've set up an Aviva Discretionary Gift Trust for your protection policy.

This form tells the Trustees who you'd like to benefit from the Trust.

The Trustees still have freedom to decide who of the Potential Beneficiaries (as defined in the Trust) is to benefit from the Trust. However, they may look at your Expression of wishes before making any decision about benefits.

We've taken every effort to make sure that this Expression of wishes is legally sound. Aviva and its representatives cannot accept any legal responsibility for error or loss however caused.

Your Personal Information

We collect and use your Personal Information as part of this trust 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.

Expression of wishes to the Trustees

Date

I/we [name/s]

of [address]

("the Settlor/Settlers")

am/are the person/people who created an Aviva Discretionary Gift Trust (Protection) – 'the Trust'

Date of trust

In this Expression of wishes I/we want to tell you the trustees, my/our wishes about who I/we would like you to consider should benefit from the Trust.

I/we understand that this Expression of wishes is not binding on the Trustees, and the Trustees will still have freedom to decide who of the class of Potential Beneficiaries (as defined in the Trust) is to benefit from the Trust, although they may consider the Expression of wishes 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"/>
<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>

As I'm/we're allowed, by the Trust, to nominate to the Trustees any person or charity (other than a Settlor) to be a Potential Beneficiary, I/we nominate the above person/s and or charity/charities (if they're not already included as Potential Beneficiaries) to be a new Potential Beneficiary of the trust.

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

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