

# Maturity payment acceptance form

## Policy details

Full name(s) of policyholder(s)	<input type="text"/>
	<input type="text"/>
Please list any former names held	<input type="text"/>
	<input type="text"/>
Residential address	<input type="text"/>
	<input type="text"/>
Name of contract	<input type="text"/>
Policy number(s)	<input type="text"/>
Email address	<input type="text"/>
Telephone number	<input type="text"/>
Fax number	<input type="text"/>
Financial adviser's name	<input type="text"/>
Financial adviser's email address (for copy correspondence)	<input type="text"/>

## Payment instructions

### Important

The maturity of your policy may have tax consequences. We recommend that you seek guidance from your financial adviser.

### Payment details

Payment should be made direct to my bank or building society account (must be policyholder's account):

Name of bank or building society	<input type="text"/>
Bank address	<input type="text"/>
Account holder(s) name(s)	<input type="text"/>
Account number	<input type="text"/>
Sort code (if applicable)	<input type="text"/> <input type="text"/> <input type="text"/> --- <input type="text"/> <input type="text"/> <input type="text"/> --- <input type="text"/> <input type="text"/> <input type="text"/>
SWIFT/BIC code (if applicable)	<input type="text"/>
IBAN	<input type="text"/>
Branch code (Hong Kong payments)	<input type="text"/>
ABA number (US payments)	<input type="text"/>

### Additional information

Please give any further details to help us remit your payment successfully, e.g. corresponding bank details (if applicable)

## Declaration

I/We hereby confirm that I/we have read and agreed with the content of the 'Important notes' and all notes specified in the relevant sections starting on this page. I/We confirm to Aviva that no proceedings in bankruptcy or insolvency, have been instituted or are pending against me.

I/We request that Aviva make a payment by maturity for the policies listed above, in accordance with the policy conditions. I/ We acknowledge that a payment by Aviva in accordance with the information contained in this form, will discharge Aviva's liability for all claims under the policies.

Please tick:

I/We enclose the original policy documents.  
If any policies are lost, a Lost Policy Declaration form must be completed.

All policyholders have signed the declaration.

Signature(s)

	Date
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	Date
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	Date
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	Date
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**Please note:** evidence of identity and residency may be required. Additionally if your policy is written under Guernsey Law, a Customer Information Form will also be required. Please contact us if you are unsure or require further clarification. You can call us on +44(0) 1722 415088 or email [olab@dgaviva.com](mailto:olab@dgaviva.com)

## Important notes

- 1 All payments will be made in the currency of the policy.
- 2 No action will be taken on any request to make payment until written notification, signed by all policyholders, has been received by Aviva at its registered address. The payment of the maturity benefits will be delayed until all necessary documentation has been received. The maturity proceeds of your policy will not be paid until after the maturity date.

## Maturity extension option request form

Life/lives assured	
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Policy number(s)	
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If you would like to take advantage of the maturity option, please return this form.

### Option to continue saving

I/We wish to continue saving for a further  years and the premiums will continue to be paid at the same level as specified in the original policy schedule.

**I/We declare that I am/we are entitled to give these instructions.**

Signature(s)

	Date
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	Date
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	Date
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	Date
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- 5 UK residents' reporting requirements – any policyholder who is UK-resident has an obligation, under the UK self-assessment tax regime, to report to HM Revenue & Customs (HMRC) any chargeable event arising in relation to the contract. Under UK law, we have a statutory requirement to supply information to HMRC about UK-resident policyholders in certain circumstances.
- 6 Aviva, which has underwritten your policy, is a member of The Association of International Life Offices (AULO). This note is designed to ensure that investors are made aware of the potential consequences of surrender of policies, particularly in circumstances where the early cashing in of an existing policy is followed by a new proposal to another life office.

The costs involved in establishing a life assurance policy for an investor are generally passed on to the investor in the form of charges payable upon the taking up of the policy, or upon its ultimate surrender. For this reason, AULO member companies endeavour to ensure that the investor is aware at the outset that such a policy should be regarded as a medium to long-term investment. In most cases, the policy will also provide that early cashing in is subject to a surrender penalty.

Investors should therefore be aware that the surrender of an existing policy in favour of a new proposal to another life office will in most cases necessitate the further payment of at least one and possibly more sets of charges by the policyholder. Investors are accordingly advised to examine carefully the level of charges payable upon surrender of one policy in favour of another and to consult their professional advisers when considering such a change. It may, for example, be that your present policy provides switching facilities, which allow a change of investment strategy at minimum cost, without the need for surrender.

The purpose of this note is to ensure that the investor is made fully aware of the potential costs of transferring from one policy to another. It is not a substitute for independent investment advice and investors should consult their own professional advisers.

- 7 Any incomplete instruction will result in a delay in processing your instruction and Aviva shall not be liable for any direct, indirect, special or consequential loss or damages arising from such delay.
- 8 If for any reason this form is incomplete and your instruction cannot be processed completely, Aviva will not process any portion of the instruction.
- 9 Are you aware of your options? If you would like further information, please call us on +44(0) 1722 415088 or email [olab@dgaviva.com](mailto:olab@dgaviva.com) and we will be happy to assist.
- 10 Trust Registration. If 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.