

Deed of Assignment

Advice

Before completing this Deed we recommend you to seek advice from your own legal and financial advisers to ensure it is suitable for you.

This Deed is not suitable if you wish to sell the policy to a buyer or mortgage it to a lender.

If you are trustees and want to assign the policy to a beneficiary, remember if there's a power of appointment in the Trust (e.g. Flexible Gift Trust and Discretionary Gift Trust) you must first complete a Deed of Appointment of Beneficiaries on an irrevocable basis.

Completing this Deed

Please complete this Deed in blue or black ink and BLOCK CAPITALS (except for signatures) and always provide full names. Please do **not** use correction fluid.

Witnesses

Each person's signature **must** be witnessed by an independent adult. In the interests of customer security, Utmost PanEurope dac reserves the right to contact customers and their witnesses and to verify the identities, signatures and/or addresses of any parties to this Deed. Failure to provide full contact details could result in the registration of this Deed being delayed.

Deletions

If you want to alter this Deed by making deletions to it, you **must** make the deletions before the Deed is signed and you **must** make sure that each deletion is initialled by all the signatories.

Tax Residence Self Certification

If you are considering using this document in connection with a bond, endowment, whole-of-life policy or immediate life annuity, please note that it is important also to complete a Tax Residence Self Certification Form for each new party who is signing. Please request a form from client.services@utmost.ie

NOTES TO COMPLETE THIS 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 (Utmost PanEurope dac).
- 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), email address(es) and address(es) of all those persons to whom the present policy owner is assigning the policy. If any present policy owner wishes to retain ownership, their name must also be included. If the assignment is to trustees, give their full names and a description of the Trust, eg. 'as trustees of the Joe Bloggs 1 May 1990 Trust'.
- 6. Present Policy Owner** Each person who currently owns the policy should sign and insert their full name, email address and address in the presence of a witness who should also sign and insert their full name and address. Could the new policy owners please sign where indicated on the last page.

After completing this Deed

This Deed, or a copy, **must** be sent immediately to Utmost PanEurope dac so that the changes made by it can be recorded.

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

THIS DEED OF ASSIGNMENT

is made on

20

(See note 1.)

1. Policy number (See note 2.) [] was issued by (See note 3.) Utmost PanEurope dac
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 of the Trust
 - by the executor/trustee of a Will in favour of the beneficiary of a specific legacy
 - by the executor/trustee of a Will in favour of the beneficiary of the residuary estate (see note 4.)
4. In this Deed the singular includes the plural, the masculine includes the feminine (and vice versa) and the assignment shall be subject to the laws of England and Wales.

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

Full name

Email address

Address (please include post code)

Full name	Email address	Address (please include post code)

IN WITNESS the present policy owner has set his hand to this Deed on the day and year mentioned above. (See note 6.)

Signed and delivered by the present policy owner

Signature

Full name, email address and address (BLOCK CAPITALS)

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In the presence of:

Witness' signature

Full name and address (BLOCK CAPITALS)

--

Signed and delivered by the present policy owner

Signature

Full name, email address and address (BLOCK CAPITALS)

--

In the presence of:

Witness' signature

Full name and address (BLOCK CAPITALS)

--

Signed and delivered
by the present policy
owner

Signature

Full name, email
address and address
(BLOCK CAPITALS)

In the presence of:

Witness' signature

Full name and address
(BLOCK CAPITALS)

Signed and delivered
by the present policy
owner

Signature

Full name, email
address and address
(BLOCK CAPITALS)

In the presence of:

Witness' signature

Full name and address
(BLOCK CAPITALS)

New policy owner(s) sign here

Privacy Notice

Our Privacy Notice explains when and why we collect personal information about our customers, how we use it, the conditions under which we may share it with others and how we keep it secure. It also explains how long we keep customer information for, how a customer can obtain details of the information we keep and the choices customers have about how we use that information. You can find a copy at www.utmostinternational.com/privacy-statements/ or you can request a copy from our Customer Service Team.

A WEALTH *of* DIFFERENCE

www.utmostinternational.com

Calls may be monitored and recorded for training purposes and to avoid misunderstandings.

Utmost PanEurope dac is regulated by the Central Bank of Ireland (No 311420). Its registered office is Navan Business Park, Athlumney, Navan, Co. Meath C15 CCW8, Ireland. Utmost PanEurope dac is a Category A Insurance Permit holder with the Jersey Financial Services Commission.

Utmost Wealth Solutions is registered in Ireland as a business name of Utmost PanEurope dac.

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