

# LETTER OF WISHES

## UTMOST INTERNATIONAL ISLE OF MAN LIMITED



To:

The Trustees

### A TRUST DETAILS

Trust name

(for example The Mary Jones Will Trust)

Utmost International  
Bond number

### B WISHES

Although I/we know that I/we may not fetter the discretion of the trustees in any way, I/we would like the following wishes to be taken into account with regard to the Declaration of Trust referred to above of which I am/we are the Settlor(s):

(Write your wishes in this box. If you are specifying your requests in relation to particular beneficiaries it is important to include details below so they can be identified in the future. We have included a separate space for such details after this box.)

Please note the details for any beneficiaries named above can be found overleaf.

**C** DETAILS OF BENEFICIARIES NAMED IN SECTION B

BENEFICIARY NAME	ADDRESS AND CONTACT DETAILS	DATE OF BIRTH	RELATIONSHIP TO THE SETTLOR	PERCENTAGE SHARE
		d d m m y y y y		%
		d d m m y y y y		%
		d d m m y y y y		%
		d d m m y y y y		%
		d d m m y y y y		%
		d d m m y y y y		%
		d d m m y y y y		%

**D** DECLARATIONS

This letter of wishes is for your consideration only and you are not legally bound by it.

**SIGNATURE**

**Settlor**

**Settlor**

Name

Date





d	d	m	m	y	y	y	y
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d	d	m	m	y	y	y	y
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**Important note:** The product(s) named in this document and to which this document relates is accurate as at December 2021 and is subject to change. To ensure applicability with respect to a product and, if applicable, a related policy, before taking any action, please liaise with your adviser and/or contact us directly.

A WEALTH *of* DIFFERENCE

www.utmostinternational.com

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

Utmost International Isle of Man Limited is registered in the Isle of Man under number 24916C.

Registered Office: King Edward Bay House, King Edward Road, Onchan, Isle of Man, IM99 1NU, British Isles.

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Utmost Wealth Solutions is registered in the Isle of Man as a business name of Utmost International Isle of Man Limited.

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