

DEFERRING A POLICY FUND ENTITLEMENT

LETTER TO TRUSTEES



For use with your own legal advisers in relation to the Lifestyle Trust

USING THE EDITABLE FIELDS?

To ensure your information is saved correctly, we recommend you save the form to your desktop before you start completing the required fields.

Note to settlor:

Please complete Sections A, B and C. You should then pass this form to your trustees for their countersignature in Section D.

All references to Utmost Wealth Solutions mean Utmost International Isle of Man Limited or Utmost PanEurope dac.

The Lifestyle Trust is available for use with Utmost Wealth Solutions bonds.

To the trustees of

(for example 'The John Brown Trust')

Policy number

Date of deferral
(must be before
vesting date of
Policy Fund(s))

d

d

m

m

y

y

y

y

A

TRUST DETAILS

Settlor's name

Trust date (Establishment date
of the Trust)

d

d

m

m

y

y

y

y

B

AMENDMENTS TO THE SECOND SCHEDULE

I would like the following Policy Fund(s), outlined within the Second Schedule of my Lifestyle Trust detailed above, to be amended as follows:

POLICY FUND	REVISED YEAR OF ENTITLEMENT

C DECLARATION

This letter confirms an amendment to the Policy Fund(s) listed above. This should be retained by the trustees with the original trust deed showing the amendment to the Second Schedule of my Lifestyle Trust. **I understand that I can only amend Policy Funds which have a vesting date after the date of this letter.**

SIGNATURE

Settlor

Name

Date

d

d

m

m

y

y

y

y

D ACKNOWLEDGEMENT BY TRUSTEES

We acknowledge receipt of this letter and accept the amendment proposed in section B.

SIGNATURE

First trustee

Name

Date

d

d

m

m

y

y

y

y

Second trustee

d

d

m

m

y

y

y

y

SIGNATURE

Third trustee

Name

Date

d

d

m

m

y

y

y

y

Fourth trustee

d

d

m

m

y

y

y

y

A WEALTH *of* DIFFERENCE

www.utmostinternational.com

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

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Utmost International Isle of Man Limited is registered in the Isle of Man under number 024916C. Registered Office: King Edward Bay House, King Edward Road, Onchan, Isle of Man, IM99 1NU, British Isles. Tel: +44 (0)1624 655 555 Fax: +44 (0)1624 611 715. Licensed by the Isle of Man Financial Services Authority.

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

Utmost PanEurope dac (registered number 311420) is regulated by the Central Bank of Ireland.

Registered Office address: 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.

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