

# DRAFT DEED OF ASSIGNMENT - ONE ASSIGNEE - NOT A TRUST

This form should only be used where the assignor and the assignee are individuals aged 18 or over. It must not be used where a company is involved as the assignor or assignee.

This deed must not be used for an assignment in connection with any loan or in connection with any charge in respect of the policies by way of security.

---

## DEED OF ASSIGNMENT - ONE ASSIGNEE - NOT A TRUST

---

THIS DEED OF ASSIGNMENT is made on

Day   Month  Year

BETWEEN

Please name the present owner at 1

1. Full Name

Present address

('the first or sole Assignor')

If the policies are owned by two persons jointly, name one owner at 1 and the other owner at 2.

2. Full Name

Present address

('the second Assignor')

Insert at 3 the full name and address of the person who is to be the sole owner from now on.

3. Full Name

Present address

Date of Birth

Occupation

('the Assignee')

## 1 THE POLICIES THAT ARE BEING ASSIGNED

Utmost PanEurope dac contracts are normally issued as a group of policies. Please enter the Swedish Executive Portfolio policy numbers to be assigned in the (a) Policy number(s) box below.

a. Policy number(s)

[illegible]

## 2 DEFINITIONS

In this Deed, unless the context otherwise provides, the masculine shall include the feminine and the singular the plural and vice versa and the following expressions shall have the meanings stated below:

'the Assignor' means the first or sole Assignor jointly with the second Assignor (if any) and each of them individually.

'the Policies' means the policy or policies in force with Utmost PanEurope dac at the date of this Deed with the policy number(s) shown in Section 1(a).

### 3 THE ASSIGNMENT

WHEREAS

- a. The Assignor is the legal and beneficial owner of the policies
- b. The Assignor wishes to assign the Policies to the Assignee.

NOW THIS DEED IS EXECUTED as follows:

1. The Assignor hereby assigns all right, title and interest in the policies to the Assignee absolutely.
2. This deed shall be governed by and construed in accordance with the law of Sweden.
3. The Assignor hereby confirms that this assignment is an immediate gift and is not made in consideration of money or money's worth nor is it made in consideration of any benefit to the Assignor by contract or otherwise.

## 4 SIGNATORIES

Utmost PanEurope dac can accept no legal or taxation responsibility for the content or effect of this document. Utmost PanEurope dac strongly recommend that any person making use of it should first ensure that his or her own legal and taxation advisers are satisfied that it will achieve the intended objectives.

THE ASSIGNOR(S) and THE ASSIGNEE have executed this document as a Deed and the Deed takes effect on the date of this Deed.

SIGNATURE

### The first or sole Assignor

--

**The second Assignor (if any)**

--

**SIGNATURE**

## The Assignee

--

## 5 DATA PRIVACY INFORMATION

For details of the Utmost International Data Privacy Policy please see [www.utmostinternational.com](http://www.utmostinternational.com) on our website.

### NOTES

1. Utmost PanEurope dac cannot advise on legal or taxation matters. You should therefore consult your legal and taxation advisers to ensure that this form is suitable for the transaction you require.
2. Any completed Deed of Assignment should be submitted to Utmost PanEurope dac for registration.
3. SUPPORTING DOCUMENTATION: Information in respect of the Assignee will be required, please contact Utmost PanEurope dac for up to date details on the requirement, Utmost PanEurope dac will be unable to note the Assignment until such a time as the identity of the Assignee is provided. Where the identity of the Assignor(s) is/are not up to date, we reserve the right to request further information to complete our records prior to noting the Assignment.

**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](http://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. Registered No 311420.

Administration Centre for correspondence: King Edward Bay House, King Edward Road, Onchan, Isle of Man, IM99 1NU, British Isles.

Tel: +353(0)1 479 3900 Fax: +353(0)1 475 1020.

Registered Office address: Navan Business Park, Athlumney, Navan, Co. Meath, C15 CCW8, Ireland.

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

UPEQ PR 12266 | 10/22