



Protection

Deed of Appointment (Absolute)

Introduction

For use with the following trust forms provided by Royal London (or the divisions known as Bright Grey and Scottish Provident):

Royal London Split Trust
Royal London Split Trust (Jointly owned plans – survivor to benefit)
Royal London Business Trust
Scottish Provident Split Trust
Scottish Provident (Joint Life, First Event)
Scottish Provident Probate Trust
Scottish Provident Business Trust
Bright Grey Split Trust
Bright Grey Split Trust +30
Bright Grey Business Trust.

You can use this deed to appoint that the plan proceeds in the trust are to be held for specific beneficiaries within the wider group of discretionary beneficiaries, as determined by the trustees after a claim has been paid. The plan proceeds can then be distributed to the chosen discretionary beneficiaries.

Notes on completion

This deed is provided strictly as a draft for the consideration of your legal advisers. Royal London cannot accept any responsibility for loss of any nature caused by the use, unchanged or otherwise, of this deed. Any guidance given on completion of the deed is given on the basis that having discussed the deed with your legal advisers it is used unchanged.

If you make any changes, you should sign and date these before the deed is completed. Please do not use correction fluid if changes are to be made. No changes can be made once the deed has been completed. Please complete the deed in block capitals.

All notes are for guidance only and do not form part of the deed.

Deed of Appointment

Note: Enter the date that this form is completed.

This Deed of Appointment is made on

Date

A Definitions

A1 The “**Donor(s)**” means

Note: Enter the name(s) of the person(s) who created the trust (as shown on the trust form). This information will be used for the usual administration and analysis purpose – see more at www.royallondon.com/protectionprivacy. This also applies if you’re the person covered.

Donor 1

Name

Address

Postcode

Donor 2

Name

Address

Postcode

A2 The “**Appointers**” means the Donor(s) if they are Trustee(s) of the Settlement and the Trustee(s) named below:

Note: Enter here the names of the present Trustee(s). The present Trustee(s) will be the original Trustee(s) of the trust (provided they have not been removed) and any additional Trustee(s) added since the trust form was completed. You should not include the Donor(s) as Trustee(s) as you will have entered their details above. Trustees’ personal information will only be used to verify the Trustees’ identity, and to confirm their instructions in the event of a claim being made. Information may also be shared with anti-money laundering and fraud prevention agencies in the rare instance that risks are identified. More information on these agencies are available in our full privacy notice at royallondon.com.

Trustee 1

Name

Address

Postcode

Date of Birth

Trustee 2

Name

Address

Postcode

Date of Birth

Trustee 3

Name

Address

 Postcode

Date of Birth

Trustee 4

Name

Address

 Postcode

Date of Birth

A3 The “Plan” means the plan numbered below effected by the Donor(s) with the Company:

Note: Insert the plan number.

Plan Number

A4 The “Schedule of Appointment” means the schedule below:

Note: Complete the name and address of each beneficiary who is to receive funds, together with the amount they are to receive. The beneficiaries listed here must be included in the class of discretionary beneficiaries of the trust. We only use this information to pay your benefits in the event of your death. Please make sure your beneficiaries are aware of how we use their information.

Beneficiary 1

Name

Address

 Postcode

Amount

Beneficiary 2

Name

Address

 Postcode

Amount

Beneficiary 3

Name

Address

 Postcode

Amount

Beneficiary 4

Name

Address

 Postcode

Amount

Beneficiary 5

Name

Address

 Postcode

Amount

Beneficiary 6

Name

Address

 Postcode

Amount

- A5** The “**Appointed Beneficiaries**” means the beneficiaries specified in the Schedule of Appointment.
- A6** The “**Appointed Part**” means such part of the Gifted Benefits (as defined in the Settlement) as is subject to the Appointers’ power of appointment and specified in the Schedule of Appointment as payable to the Appointed Beneficiaries.
- A7** The “**Company**” means The Royal London Mutual Insurance Society Limited (and the divisions known as Bright Grey and Scottish Provident).
- A8** The “**Retained Part**” means such part of the Gifted Benefits not comprised in the Appointed Part.
- A9** The “**Settlement**” means the settlement dated by the Donor(s), together with any supplementary documents specified below.

Note: Enter the date of the trust form and list any supplementary trust documents.

Supplementary Documents

B Recitals

- B1** This Deed is supplemental to the Settlement.
- B2** The Appointers are the present Trustees of the Settlement.
- B3** The Trustees hold the Trust Fund in accordance with the Trusts declared in the Settlement.
- B4** The Appointers in exercise of the powers conferred upon them in the Settlement wish to appoint the Appointed Part.

C Appointment

The Appointers, in exercise of the power of appointment conferred by the Settlement, hereby irrevocably appoint and declare that the Appointed Part shall from the date of this Deed be held upon trust absolutely for the Appointed Beneficiaries in the amounts specified in the Schedule of Appointment and revocably appoint and declare that the Retained Part shall be held subject to the trusts declared in the Settlement.

D Signatures

Signed as a Deed by the parties hereto in the presence of the witnesses undersigned on the day and year first above written.

Note: Please ensure that all signatures are witnessed by an independent person. The same person may witness all signatures. Witnesses' personal information will only be used to process this form, or in the event of any dispute relating to the trust.

* If any Trustee is a corporate body, please complete the name of the authorised signatory and the capacity in which they are signing – for example, Director.

Donor 1

Name

Signature

Witness

Name

Address

 Postcode

Signature

Donor 2

Name

Signature

Witness

Name

Address

 Postcode

Signature

Trustee 1

Name

*authorised signatory name

*authorised signatory capacity

Signature

Witness

Name

Address

 Postcode

Signature

Trustee 2

Name

*authorised signatory name

*authorised signatory capacity

Signature

Witness

Name

Address

 Postcode

Signature

Trustee 3

Name

*authorised signatory name

*authorised signatory capacity

Signature

Witness

Name

Address

Postcode

Signature

Trustee 4

Name

*authorised signatory name

*authorised signatory capacity

Signature

Witness

Name

Address

Postcode

Signature



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We're happy to provide your documents in a different format, such as Braille, large print or audio, just ask us when you get in touch.

All of our printed products are produced on stock which is from FSC® certified forests.

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