

DEED OF ASSIGNMENT (ENGLAND, WALES, NORTHERN IRELAND)

ASSIGNATION (SCOTLAND)

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COMPLETION NOTES

1. The forms of Assignment/Assignment are for use where the policy is passing between individuals by way of outright gift only. It is not to be used where there is any form of consideration or as security for any loan.
2. The forms must not be used in divorce case scenarios - policyholders should refer to their solicitors.
3. When completed, please keep this form with the policy document. A Notice of Assignment/Assignment should be given to Athora Ireland plc.
4. When a guaranteed product, offshore bond, onshore bond or unit-linked life policy is assigned, we have to receive a declaration confirming the assignee's tax residency.

When completed, please send us the form together with a completed **Policyholder details form**, which you can find at www.athora.com/ie

Please speak to a financial adviser for further information.

Notes for users

These notes are for guidance only. They don't form part of the Deed.

Enter the name(s) and address(es) of the person(s) granting the Deed, in other words the Policy owner(s).

Enter the name(s) and address(es) of the person(s) the Policy is being assigned to.

Enter the name of the Life/Lives Assured, name of Insurer, Date of Policy and Policy Number.

Deed of Assignment (England, Wales, and Northern Ireland)

This Deed of Assignment is made between

A. (name)

of (address)

B. (name)

of (address)

(‘the Assignor’)

and

C. (name)

of (address)

D. (name)

of (address)

(‘the Assignee’)

Witnesseth as follows

The Assignor hereby assigns to the Assignee by way of gift all that policy of assurance on the life of

(name)

effected with

(name of Insurer)

dated (dd/mm/yyyy)

and numbered

together with all the monies receivable or to become receivable thereunder and all benefits thereby **to hold** the same unto the Assignee absolutely.

Date of Signing the Deed (in other words the date the last person signs).

This section of the Deed is designed to obtain a witnessed signature to the Assignor signature(s). A witness should be an adult and not be party to the Deed.

A witness can witness more than one signature. A financial adviser may act as a witness if he/she is not party to the Deed.

This section is designed to obtain a witnessed signature to the Assignee signature(s). See the note above for the rules about who can act as a witness.

In witness whereof the parties hereto have executed this Deed as follows

Date of execution (dd/mm/yyyy)

Signed as a deed and delivered

By the Assignor

By the Assignor

In the presence of Witness

In the presence of Witness

Name

Name

Address

Address

Postcode

Postcode

Occupation

Occupation

Signed as a deed and delivered

By the Assignee

By the Assignee

In the presence of Witness

In the presence of Witness

Name

Name

Address

Address

Postcode

Postcode

Occupation

Occupation

This form is supplied as a specimen only. Individuals are advised to consult their solicitors or obtain such other advice as may be necessary to ensure that their wishes are properly documented and given effect.

Assignment (Scotland)

Please enter the name(s) and address(es) of the person(s) granting the Deed, in other words the Policy owner(s).

I/We

(name)

residing at

(address)

and

(name)

residing at

(address)

(‘the Assignor’)

for no consideration wish(es) to assign the Policy of Assurance aftermentioned to

(name)

residing at

(address)

and

(name)

residing at

(address)

(‘the Assignee’)

Enter the name(s) and address(es) of the person the Policy is being assigned to.

Considering that the Assignor is the owner of all that policy of life assurance issued by

(name of Insurer)

Enter the Name of Insurer, Date of Policy and Policy Number.

dated (dd/mm/yyyy)

and numbered

(‘the Policy’) and now wishes to assign the Policy to the Assignee to be held by the Assignee absolutely.

Now therefore the Assignor **hereby assigns** to the **Assignee all and whole** the Policy together with all monies assured thereby and all and any bonuses and other monies which may become payable in respect thereof and the full benefit thereof **to hold unto** the Assignee absolutely as beneficial owner **subject** to the payment of any future premiums thereon by the Assignee as may be required. The Assignor confirms that the Policy hereby assigned is now valid and in full force and that the Assignor will not do or omit or knowingly suffer anything whereby the Policy may become void or voidable or the Assignee, or anyone claiming title through the Assignee, be prevented from receiving the money thereby assured or any bonus or addition thereto.

This form is supplied as a specimen only. Individuals are advised to consult their solicitors or obtain such other advice as may be necessary to ensure that their wishes are properly documented and given effect.

In witness whereof the Assignor has subscribed these presents

At (place) on (dd/mm/yyyy)

Place and date of signing this Deed.

Before the Witness hereto subscribing.

This section is designed to obtain a witness signature to each Assignor's signature. A witness should be an adult and should not be party to the Deed.

A witness can witness more than one signature. A financial adviser may act as a witness if he/she is not party to the Deed.

By the Assignor

X X

In the presence of Witness

X X

Name

Address

By the Assignor

X X

In the presence of Witness

X X

Name

Address

Occupation Occupation

Signed as a deed and delivered

Postcode

Postcode

By the Assignee

X X

In the presence of Witness

X X

Name

Address

By the Assignee

X X

In the presence of Witness

X X

Name

Address

Occupation Occupation

This section is designed to obtain a witnessed signature to the Assignee signature(s). See the note above for the rules about who can act as a witness.

Postcode

Postcode

This form is supplied as a specimen only. Individuals are advised to consult their solicitors or obtain such other advice as may be necessary to ensure that their wishes are properly documented and given effect.



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