

# Deed of Assignment



## General notes

### Advice

Don't complete this deed until you've taken advice from your own legal and financial advisers to ensure it's suitable for you.

This deed isn't suitable if you wish to sell the policy to a buyer or mortgage it to a lender.

If you're trustees and want to assign the policy to a beneficiary, remember if there's a power of appointment in the trust (e.g. a Flexible Gift Trust; a Discretionary Gift Trust) you must first complete a Deed of Appointment of Beneficiary on an irrevocable basis.

### Completing this Deed

Please complete this deed in ink or electronically in the fields provided. Please use block capitals (except for signatures) and always give full names.

Please **don't** use correction fluid.

### Witnesses and customer security

Each person's signature **must** be witnessed by an independent adult. In the interests of customer security, Aviva reserves the right to contact customers and their witnesses and to verify the identities, signatures and/or addresses of any parties to this deed. Failure to provide full contact details could result in the registration of this deed being delayed.

### Deletions

If you want to alter this deed by making deletions to it, you **must** make the deletions before the deed is signed and you **must** make sure that each deletion is initialled by all the signatories.

### Change of ownership

As the legal ownership has changed, any current financial adviser acting on the policy will be removed as well as any ongoing adviser charges. If the policyholders wish to keep the current financial adviser we'll need a letter of authority signed by policyholders. If you want to pay ongoing adviser charges we'll need all policyholders to sign the Adviser Charge Agreement on Bonds form (IN06055).

### Trust Registration

If your policy is written into a trust, there may be an action to register the trust with HMRC. Registration is the trustee's responsibility. As part of our checks, we may ask to see evidence that this has been done. If you can't show us proof, this may delay your policy being processed. You can find more information about the Trust Registration Service on the **Government website**. If you're unsure about what you need to do, you should speak to a legal or financial adviser.

## Tax Residence Self Certification

If you're considering using this document in connection with a bond, endowment, whole of life policy or immediate life annuity, please note that it's important also to complete a Tax Residence Self Certification form (IN06062 or IN06064) for each new party who is signing. You can obtain the form from your financial adviser.

## Notes to complete this Deed

- 1. Date** Insert the date on which the deed is completed. **Don't** backdate or forward-date this deed.
- 2. Policy** Insert the policy number. If you only wish to assign some segments, include only the segment numbers to be assigned, otherwise the whole policy will be assigned.
- 3. Insurance company** Insert the name of the insurance company shown on the policy document.
- 4. Clause 3** Tick one box only. This will identify the reason for the assignment.
- 5. Schedule of New Policy Owner(s)** Insert the full name(s), address(es) and contact details of all those persons to whom the Present Policy Owner is assigning the policy. This includes all new owners and any present policy owners who will continue to own the policy with them.
- 6. Present Policy Owner** Each person who currently owns the policy should sign and insert their full name, address and contact details in the presence of a witness who should also sign and insert their full name, address and contact details. The New Policy Owners should also sign in the relevant box.

### After completing this Deed

This deed, or a copy, **must** be sent immediately to Aviva so that the changes made by it can be recorded. The original deed should be held in a safe place with the policy document.

**Every effort has been taken to ensure that the form of this deed and the related printed documentation are legally sound but Aviva and its representatives cannot accept any legal responsibility for error or loss however caused.**

### Your Personal Information

We collect and use your Personal Information as part of this assignment process. If you would like more information about how we use and process Personal Information and your rights in relation to it, you can find further detail in our full privacy policy at [aviva.co.uk/privacypolicy](https://www.aviva.co.uk/privacypolicy) or request a copy by writing to us at: The Data Protection Team, Aviva, PO Box 7684, Pitheavlis, Perth PH2 1JR.

# This Deed of Assignment

is made on

(See note 1.)

1. Policy numbered  was issued by   
(See note 2.) (See note 3.)

2. BY THIS DEED the Present Policy Owner (whose name and signature appear below) ASSIGNS the Policy described above to the New Policy Owner named in the Schedule of New Policy Owner(s) absolutely

3. By ticking one of the boxes below the Present Policy Owner confirms that this assignment is made

- As part of a divorce, annulment or separation agreement
- By way of a gift, in consideration of natural love and affection
- By the trustee of a Trust in favour of the beneficiary
- By the executor/trustee of a Will in favour of the beneficiary

4. In this deed the singular includes the plural the masculine includes the feminine (and vice versa)

## Schedule of New Policy Owner(s) (See note 5.)

Full Name	Address (please include postcode)	Telephone Number(s) (Please include the full code and any extensions)
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**In Witness** the Present Policy Owner has executed and delivered this deed on the day and year mentioned above.

(See note 6.)

Signed and Delivered as  
a deed by the Present  
Policy Owner

Signature

Full name and address  
(block capitals)

Telephone Number(s)  
(Please include the  
full code and any  
extensions)

In the presence of:

Witness' signature

Full name and address  
(block capitals)

Telephone Number(s)  
(Please include the  
full code and any  
extensions)

Signed and Delivered as  
a deed by the Present  
Policy Owner

Signature

Full name and address  
(block capitals)

Telephone Number(s)  
(Please include the  
full code and any  
extensions)

In the presence of:

Witness' signature

Full name and address  
(block capitals)

Telephone Number(s)  
(Please include the  
full code and any  
extensions)

Signed and Delivered as  
a deed by the Present  
Policy Owner

Signature

Full name and address  
(block capitals)

Telephone Number(s)  
(Please include the  
full code and any  
extensions)

In the presence of:

Witness' signature

Full name and address  
(block capitals)

Telephone Number(s)  
(Please include the  
full code and any  
extensions)

Signed and Delivered as  
a deed by the Present  
Policy Owner

Signature

Full name and address  
(block capitals)

Telephone Number(s)  
(Please include the  
full code and any  
extensions)

In the presence of:

Witness' signature

Full name and address  
(block capitals)

Telephone Number(s)  
(Please include the  
full code and any  
extensions)

**New Policy Owner(s) sign here**

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