



RELEVANT LIFE POLICY TRUST – DEED OF APPOINTMENT AND ASSIGNMENT

You can use this Deed to transfer the ownership of a plan from the Trustees to the insured employee named in the Trust (the Member), for example, if the employee will no longer be employed by the business.

Important notes

This Deed is only suitable for use with Relevant Life Plans issued by Royal London (and the divisions known as Bright Grey and Scottish Provident) that have been placed in a Royal London, Scottish Provident or Bright Grey Relevant Life Policy Trust. 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.

Once signed, a copy of this form must be returned to us for noting. You should not send the original form, which should be kept with the plan documents and other trust papers. If a claim is made the original form and other trust papers must be produced before payment can be made.

Deed of Appointment and Assignment

Note: Enter the date.

This Deed of Appointment and Assignment is made on:

Date

A Parties

A1 The “Principal Employer” means

Note: Enter the name and address of the employer who created the trust (as shown on the trust form).

Name

Address

Postcode

A2 The “**Appointer**” means the Principal Employer if it is a Trustee of the Settlement and the Trustee(s) named below.

Note: Enter here the name(s) and address(es) 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. Do not enter the Principal Employer’s details here, as you will have entered the details above.

Additional Trustee 1

Name

Address

 Postcode

Additional Trustee 2

Name

Address

 Postcode

Additional Trustee 3

Name

Address

 Postcode

Additional Trustee 4

Name

Address

 Postcode

A3 The “**Assignor**” means the Appointer.

A4 The “**Assignee**” means

Note: Enter here the name and address of the employee to whom the Trustees are transferring ownership of the plan.

The Member

Name

Address

 Postcode

B Plan to be appointed and assigned

B1 The “**Appointed Plan**” shall mean the following plan(s) effected by the Principal Employer with the Company

Note: Complete the plan number.

Plan number

B2 The “**Company**” means The Royal London Mutual Insurance Society Limited (and the divisions known as Bright Grey and Scottish Provident).

C Recitals

C1 This Deed is supplemental to the Settlement (“**the Settlement**”) by the Principal Employer dated:

Note: Enter the date of the Trust form.

Date

C2 The Appointer and the Assignor are the present Trustees of the Settlement.

C3 The Trustees hold the Appointed Plan (which expression shall where the context admits include all money assured by or to become payable by virtue of the Appointed Plan and all profits, bonuses or additions which may have accrued or which may accrue in any manner thereon) in accordance with the Trust declared in the Settlement.

C4 The Appointer in exercise of the powers conferred upon them in the Settlement wishes to appoint the Appointed Plan.

C5 The Assignor wishes to assign the Appointed Plan to the Assignee.

D Appointment

The Appointer, in exercise of the power of appointment conferred by the Settlement, hereby irrevocably appoints and declares that the Appointed Plan shall from the date of this Deed be held upon trust for the Assignee absolutely.

E Assignment

The Assignor hereby assigns the Appointed Plan to the Assignee.

F Obligations of the Assignor

F1 The Assignor hereby covenants with the Assignee that they have no further interest in the Appointed Plan.

F2 The Assignor shall not be under any obligation to keep up the Appointed Plan or to reinstate the Appointed Plan if it shall become void and they shall have no right to reimbursement or lien over the Appointed Plan in respect of any premiums paid by them.

G Stamp Duty Certificate

It is hereby certified that this instrument falls within Category F in the Schedule to the Stamp Duty (Exempt Instruments) Regulations 1987.

H 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. The Principal Employer should not sign if they have been removed as a Trustee.

* If the Principal Employer is not an individual, please also include the name of the person who is signing on behalf of the Principal Employer (the authorised signatory) and the capacity in which they are signing (for example, Director).

The Principal Employer

Name

Signature

Date

D	D	M	M	Y	Y	Y	Y
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*authorised signatory name

*authorised signatory capacity

Witness

Name

Address

Postcode

Signature

Additional Trustee 1

Name

Signature

Date

D	D	M	M	Y	Y	Y	Y
---	---	---	---	---	---	---	---

Witness

Name

Address

Postcode

Signature

Additional Trustee 2

Name

Signature

Date

D	D	M	M	Y	Y	Y	Y
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Witness

Name

Address

<input type="text"/>	Postcode	<input type="text"/>
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Signature

Additional Trustee 3

Name

Signature

Date

D	D	M	M	Y	Y	Y	Y
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Witness

Name

Address

<input type="text"/>	Postcode	<input type="text"/>
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Signature

Additional Trustee 4

Name

Signature

Date

D	D	M	M	Y	Y	Y	Y
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Witness

Name

Address

<input type="text"/>	Postcode	<input type="text"/>
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Signature

The Member

Name

Signature

Date

D	D	M	M	Y	Y	Y	Y
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Witness

Name

Address

Postcode

Signature



Royal London

1 Thistle Street, Edinburgh EH2 1DG

royallondon.com

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