



## Protection

# Relevant Life Plan 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

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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 Plan 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.

### Verifying your identity and preventing fraud

To protect our customers we may have to verify the identity of certain individuals connected to a policy. We do this electronically to make things easier for you. If these individuals would prefer us not to do this electronically please call us on 0345 6094 500 so we can talk through what needs to be sent to us.

**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

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**Note:** Enter the date.

This Deed of Appointment and Assignment is made on:

Date

## A Parties

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### A1 The “Principal Employer” means

**Note:** Enter the name and address of the employer who created the trust (as shown on the trust form). As the principal employer personal information will be used for the usual administration and analysis purpose – see more at [royallondon.com/protectionprivacy](http://royallondon.com/protectionprivacy).

Name	<input type="text"/>		
Address	<input type="text"/>		
	<input type="text"/>		
	<input type="text"/>	Postcode	<input type="text"/>

### 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. 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/protectionprivacy](http://royallondon.com/protectionprivacy).

#### Additional Trustee 1

Name	<input type="text"/>		
Address	<input type="text"/>		
	<input type="text"/>		
	<input type="text"/>	Postcode	<input type="text"/>

Date of birth

#### Additional Trustee 2

Name	<input type="text"/>		
Address	<input type="text"/>		
	<input type="text"/>		
	<input type="text"/>	Postcode	<input type="text"/>

Date of birth

#### Additional Trustee 3

Name	<input type="text"/>		
Address	<input type="text"/>		
	<input type="text"/>		
	<input type="text"/>	Postcode	<input type="text"/>

Date of birth

#### Additional Trustee 4

Name

Address   
  
 Postcode

Date of birth

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. This information will be used for the usual administration and analysis purpose – see more at [royallondon.com/protectionprivacy](http://royallondon.com/protectionprivacy). This also applies if they’re the person covered.

#### The Member

Name

Address   
  
 Postcode

## B Plan to be appointed and assigned

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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

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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

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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

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The Assignor hereby assigns the Appointed Plan to the Assignee.

## F Obligations of the Assignor

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- 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

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

## H Signatures

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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. Witnesses' personal information will only be used to process this form, or in the event of any dispute relating to the trust.

\* 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	<input type="text"/>
Signature	<input type="text"/>
Date	<input type="text" value="D"/> <input type="text" value="D"/> <input type="text" value="M"/> <input type="text" value="M"/> <input type="text" value="Y"/> <input type="text" value="Y"/> <input type="text" value="Y"/> <input type="text" value="Y"/>
*authorised signatory name	<input type="text"/>
*authorised signatory capacity	<input type="text"/>

### Witness

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

### Additional Trustee 1

Name	<input type="text"/>
Signature	<input type="text"/>
Date	<input type="text" value="D"/> <input type="text" value="D"/> <input type="text" value="M"/> <input type="text" value="M"/> <input type="text" value="Y"/> <input type="text" value="Y"/> <input type="text" value="Y"/> <input type="text" value="Y"/>

**Witness**

Name

Address

 Postcode 

Signature

**Additional Trustee 2**

Name

Signature

Date

       

**Witness**

Name

Address

 Postcode 

Signature

**Additional Trustee 3**

Name

Signature

Date

       

**Witness**

Name

Address

 Postcode 

Signature

**Additional Trustee 4**

Name

Signature

Date

**Witness**

Name

Address

Postcode

Signature

**The Member**

Name

Signature

Date

**Witness**

Name

Address

Postcode

Signature



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royallondon.com

**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.**

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