

Trust Records

Notice of Assignment of an Investment Bond to a Trust

To:
(Insert name of Insurer)

We hereby give you notice that on in the year
(Insert the date of assignment)

the Investment Bond specified below was assigned to:
(Insert their full names and addresses of the Trustees to whom it was assigned.)

of:

and:

of:

and:

of:

and:

of:

as Trustees of a Trust dated:

(Insert the date of the Trust)

made by the previous policy owner:

(Insert the full name(s) of the Assignor(s))

We enclose a copy of the trust deed for your records. Please acknowledge receipt of this notice by countersigning and returning the enclosed copy of this Notice of Assignment.

Bond Number(s)	Commencement Date	Life/Lives Assured

(Include full details of the Bond being assigned. All the Assignees (Trustees) should sign here.)

Signed:

(First Trustee)

(Second Trustee)

(Third Trustee)

(Fourth Trustee)

Date:

For completion by insurer only

Countersigned by:

Name:

Position:

Name of Insurer:

Date:

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