



For customers

Deed of removal of beneficiaries by trustees

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.

Completion notes

1. This form is designed for use with trusts governed by the laws of England, Wales, Northern Ireland and Scotland.
2. This form is for use by Trustees to remove a beneficiary from the trust with the beneficiary's consent.
3. The beneficiary being removed must be aged 18 or over.
4. When completed, please retain this form with the original trust form and policy document.
5. This form is supplied as a specimen only. Individuals are advised to consult their solicitor or obtain such other advice as may be necessary to ensure that their wishes are properly documented and given effect.

Notes for users

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

Please enter the Name(s) and Address(es) of all Trustees.

Insert the Name of Settlor, Trust Date, name of Insurer and all applicable Policy Number(s).

Insert the name of the beneficiary who is to be removed.

Insert the name of the beneficiary who is to be removed.

Date of Signing of this Deed.

This Deed of Removal is made by

i.	<input type="text"/>	(name)
of	<input type="text"/>	(address)
	<input type="text"/>	
	<input type="text"/>	
ii.	<input type="text"/>	(name)
of	<input type="text"/>	(address)
	<input type="text"/>	
	<input type="text"/>	
iii.	<input type="text"/>	(name)
of	<input type="text"/>	(address)
	<input type="text"/>	
	<input type="text"/>	

(hereinafter referred to as 'the Trustees')

Whereas

- a. The Trustees are the Trustees presently acting under or pursuant to a Trust Request/Declaration of Trust by and dated relative to a policy or policies ('the Policy') with and numbered .
- b. The Trustees wish to remove as a Beneficiary under the said Trust Request/Declaration.

Therefore

The Trustees, with effect from the date of execution of this Deed, remove as a Beneficiary under the said Trust Request/Declaration of Trust.

In witness whereof these present are executed by the Trustees as follows:

Date of Execution

D	D	M	M	2	0	Y	Y
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This section is designed to obtain a witnessed signature to each Trustee. A witness should be an adult and should not be a party to the Deed. A witness can witness more than one Trustee signature.

Signed as deed and delivered by

As Trustee in the presence of

Trustee Signature

Witness Signature

Witness name

Address

Occupation

Signed as deed and delivered by

As Trustee in the presence of

Trustee Signature

Witness Signature

Witness name

Address

Occupation

Insert name of Beneficiary who is to be removed, the settlor's name, Trust Date, name of Insurer and all applicable Policy Number(s).

I, being aged over 18 and being a Beneficiary under a Trust Request/Declaration of Trust by and dated relative to a policy or policies ('the Policy') with and numbered hereby consent to the Trustees removing me as a Beneficiary under the said Trust Request/Declaration of Trust.

Beneficiary Signature

Date



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