

For customers

Document requesting loan repayments

This letter should be drawn up by the settlor and sent to the trustees, when setting up a Loan Trust, to formalise the repayment schedule of the loan to the settlor in circumstances where it is intended to start taking repayment in the near future. Your financial adviser may wish to adapt this wording, or draw up their own wording, in conjunction with a lawyer.

If your personal circumstances mean you need any additional support, or if you'd like a large print, Braille or audio CD version of this document, please call 03456 10 00 10 (call charges will vary) or visit aegon.co.uk/onlineform

To: Trustees of the Trust dated:

D	D	M	M	Y	Y	Y	Y
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by

(the settlor)

Unless and until I otherwise direct please repay to me without the need for further demand, the loan as detailed in the said Trust at the rate of

£ a year

payable in instalments as follows:

- yearly
 half-yearly
 quarterly
 monthly

(Please tick the preferred frequency.)

The first instalment shall become due and payable on the first

- yearly
 half-yearly
 quarterly
 monthly

anniversary of the date of the Trust.

(Please tick the preferred option.)

This request shall not be deemed in any way to restrict my right to demand repayment of the loan or the balance thereof outstanding at any time in accordance with the Trust provisions.

Date

D	D	M	M	2	0	Y	Y
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Signature of Settlor

X	X
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The above is supplied as a specimen only. Individuals are advised to consult their solicitors or other professional advisers to ensure that their wishes are properly documented and given effect.

