

Draft Deed of Assignment By Personal Representatives to a Beneficiary

How to fill out this form

Please use black ink and write in CAPITAL LETTERS. Any mistakes must be crossed through and any changes initialled.

About this form

This form is designed to be used where the Legal Personal Representatives, Executors or Administrators wish to assign a policy to one beneficiary. **If the assignment relates to a qualifying life policy, the assignee must also fully complete and send us a Qualifying policy declaration form (LIFM10009) which is available on request – the plan's qualifying status will be lost if we do not receive the completed declaration form within 3 months of the assignment date.**

In this document the Legal Personal Representatives, Executors or Administrators will be the assignor(s) and the beneficiary the assignee.

The Prudential Assurance Company Limited and Prudential International Assurance plc, UK Branch, cannot accept responsibility for the use of this form. Whether this form is suitable will depend on the relevant circumstances. Before considering the use of any part of this form, the parties should consult with their legal professional adviser(s).

Please send this form to:
Prudential, Lancing BN15 8GB

For Prudential Onshore Portfolio Bond, Prudential International Investment Bond and Prudential International Investment Portfolio, please send this form to:
Prudential International Assurance, PO Box 13395, Chelmsford CM99 2GH.

Section 1 – Deed of Assignment to Beneficiary of a Will or through Intestacy

This Deed of Assignment to the beneficiary is made on

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

This is the date the last party has signed this form.

Legal Personal Representatives, Executors
or Administrators

Legal Personal Representatives, Executors
or Administrators

Legal Personal Representatives, Executors
or Administrators

Legal Personal Representatives, Executors
or Administrators

and

Assignee

Assignee's
date of birth

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

Please give the full name, address and date of birth of the assignee – i.e. the beneficiary.

Section 2 – Additional information

Important Note

Where your bond/plan has a number of separate identical policies (individual segments) and the assignment is to relate to only one or more policies, not the whole bond/plan, please record only the policies to be assigned within the Policy(ies) Number(ed) section below. If for example you record 123456A 000 this will result in only one policy being assigned. 123456A 000 – 009 will result in 10 policies being assigned. If the assignment is for the whole bond/plan, please record the full bond/plan number for example 123456A 000 – 019.

Whereas

The Assignors are the Legal Personal Representatives, Executors or Administrators of the estate of the late:

Who died on

The Assignors are the owners of Prudential Assurance Company Limited, and Prudential International Assurance plc Policy No:

The Assignors wish to assign the policy/segment(s) to the Assignee.

The Assignors hereby assign absolutely to the Assignee the policy/segment(s) specified above and the Assignors shall have no further interest in the policy/segment(s).

Section 3 – Declaration and signatures

In and as witness whereof these presents are executed and delivered as a Deed as follows:

1. Name of 1st Assignor

Signature

In the presence of: Name of Witness

Witness signature

Witness address

2. Name of 2nd Assignor

Signature

In the presence of: Name of Witness

Witness signature

Witness address

Please enter the policy/segment(s) to be assigned in the box opposite.

All Assignors/Assignee must sign this Deed and have their signatures witnessed.

Witnesses must be over 18 and independent of the parties to this deed.

Section 3 – Declaration and signatures (continued)

3. Name of 3rd Assignor

Signature

In the presence of: Name of Witness

Witness signature

Witness address

4. Name of 4th Assignor

Signature

In the presence of: Name of Witness

Witness signature

Witness address

5. Name of Assignee

Signature

In the presence of: Name of Witness

Witness signature

Witness address

Section 4 – Data protection notice

How we use your personal information

For a copy of our latest Data Protection Notice, please visit pru.co.uk/mydata. This details how and why we use your personal information (including any sensitive personal information), who we may share it with and your rights around your personal information. Alternatively, you can request a hard copy to be sent to you by writing to

The Data Protection Officer, Customer Service Centre, Lancing BN15 8GB.

Please note that we collect personal information from you that is necessary for us to either provide you with the product or service you've requested or to comply with statutory or contractual requirements. Unfortunately if you don't provide all of the information we require this may mean we are unable to provide our products and services to you.

