

Death Benefits Trust Instruction Form

This form will provide us with instructions for a trust for death benefits under life assurance or pension schemes. A trust is a way of avoiding Inheritance Tax on your death and (in the case of a couple) on the survivor's death. Funds held in a trust can be used to provide for a surviving spouse or partner, but without the capital forming part of their taxable estate on death, which would be the case if the funds had passed directly to them. Trusts can also be tax-efficient in relation to the costs of bringing up children.

It is suggested that you read our information sheet entitled "Trusts for Death Benefits" and, if you then wish to proceed, you should complete this form as fully as possible and return it to us. We will then contact you to take the matter further.

Please write clearly and answer all the questions. If there is insufficient space on this form, please use a separate sheet of paper.

1. PERSONAL DETAILS

A. Your Details

Full names:

Address:

Occupation:

e-mail address :

Telephone numbers:

Home:

Business:

Mobile:

Date of Birth:

Place of Birth:

National insurance number:

Tax office and reference:

If the above name is not the name by which you are normally known, please write here your other name or names:

B. Your Spouse/Civil Partner/Partner

Full names:

Occupation:

Date of Birth:

Place of Birth:

National insurance number:

Tax office and reference:

If the above name is not the name by which you are normally known, please write here your other name or names:

C. Your Children (and those of your spouse/civil partner/partner)

Please identify clearly children by any previous marriage or relationship. If you do not have children, we would normally make provision for any that you may have in the future, unless you advise us that this is not appropriate.

<i>Full Names of Children</i>	<i>Addresses (if different from your own)</i>	<i>Ages</i>
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2. DETAILS OF DEATH BENEFITS

Please state the names of the insurance/pension providers and policy numbers.

Please also provide estimates of the death benefits.

<i>Assets</i>	<i>You</i>	<i>Spouse/Partner</i>	<i>Joint names</i>
Life assurance 1 (sole name)	£ _____	£ _____	
Life assurance 2 (sole name)	£ _____	£ _____	
Life assurance (joint names, payable on first death)			£ _____
Life assurance (joint names, payable on second death)			£ _____
Occupational pensions (show death benefit)	£ _____	£ _____	
Personal pensions (show death benefit)	£ _____	£ _____	
Other death benefits	£ _____	£ _____	£ _____
TOTALS	£ _____	£ _____	£ _____

Please provide details and values of any gifts you have made to a trust or company within the last seven years:

(if left blank, we will assume none)

	£ _____	£ _____	£ _____
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3. TRUST DETAILS

A. Trustees

You need to choose your trustees carefully. It would be common to appoint yourself, your spouse or partner and one other person who can be relied upon to operate the trust in a responsible manner. Please indicate your choice by ticking one box only of the options below:

- (a) I wish the trustees to be myself, my spouse/civil partner/partner and the person named below

Additional Trustee's full name *Address*

- (b) I wish the trustees to be the persons named below

Trustees' full names *Address*

1.

2.

3.

B. Name of Trust

The name of the trust will be shown as, for example, "The John Smith Death Benefits Trust", unless you give your own choice below. Please note that, in the case of a couple, there will be one trust for each of you (assuming both have arrangements involving death benefits).

Proposed name of trust(s):

C. Type of Trust

Unless you specify otherwise, the trust will be a Discretionary Trust. If you would like a different arrangement (for example, a Life Interest Trust), please state this below.

Further details are contained in our information sheet on "Trusts for Death Benefits".

Please state any preference here:

(Otherwise leave blank for a Discretionary Trust).

D. Beneficiaries

Unless you state to the contrary, the beneficiaries will be shown as your spouse/civil partner/partner, your children and grandchildren. The trustees will have power to bring in other people as beneficiaries, at their discretion. Please indicate your choice by ticking one box only of the options below:

(a) I wish the beneficiaries to be my spouse/civil partner/partner, children and grandchildren only

(b) I wish the beneficiaries to be the persons stated above together with the persons named below

<i>Beneficiaries' full names</i>	<i>Address</i>	<i>Relationship to you</i>
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1.

2.

(c) I wish the beneficiaries to be the persons named below

<i>Beneficiaries' full names</i>	<i>Address</i>	<i>Relationship to you</i>
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1.

2.

3.

SIGNED: _____ DATED: _____

SIGNED: _____

(spouse/civil partner/partner)

Please return this form to Thomson Snell & Passmore

3 Lonsdale Gardens, Tunbridge Wells, Kent TN1 1NX

Telephone No. 01892 510000

Fax No. 01892 549884

e-mail: solicitors@ts-p.co.uk