



Deed of Assignment

About this form

To change the legal ownership of a life assurance or capital redemption policy by way of gift only (gift assignment from single assignor to joint assignees).

Please use black ink and write in CAPITAL LETTERS or tick as appropriate.

Important:

This deed is for the consideration of solicitors acting for the assignor/assignees. It should only be used after independent professional advice has been taken. Prudential International Assurance plc (Prudential International) cannot accept any responsibility for its use. If it is not suitable for use in its present form, a separate deed should be drawn up to cover the precise needs of the assignor/assignees.

This form should not be amended in any way.

- › If we are deducting regular withdrawals, Ongoing Adviser Charges or other deductions we can be authorised to make and pay from a bond, any change in ownership will result in the suspension of such transactions until we receive a request in writing (or such other format that we may agree to at the time) from the new owners for them to resume, or for a new arrangement to be set up.
- › The assignment includes no guarantee of the assignor's title to the policy. If such a guarantee is intended or required to be given, legal advice should be sought.
- › Independent advice should be sought from a solicitor, financial advisor or accountant on the tax implications of the assignment of a life policy.
- › This form is **not suitable** for use by a personal representative, Executor or a Trustee.
- › This form **cannot** be used for an assignment to a minor or minors.
- › This form **cannot** be used to implement a financial arrangement ordered or approved by a court.

Please refer to the information above, before considering the use of this assignment wording.

How we use your personal information

For the **International Portfolio Bond – Lives Assured or Capital Redemption** – To understand how and why we use your personal information (including any sensitive personal information) that we collect from you, who we may share it with and your rights around your personal information you can review a copy of our Privacy Notice at www.pru.co.uk/mydata-int.

For other **Prudential International products** – For a copy of our latest Data Protection Notice, please visit www.pru.co.uk/mydata-pia.

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.

Please note that we only collect personal information from you that is necessary to provide you with the product or service you have requested. So while we will not use your personal information for all of the purposes set out in our Privacy Notices, we may need to use it, for example, to contact you further about your request or for legal or regulatory purposes.

Deed of assignment – (assignment from single assignor to joint assignees)

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 show only the policies to be assigned. For example, if you record 123456A 001 this will result in only one policy (001) being assigned. If you show 123456A 001 – 010 will result in 10 policies (001-010) being assigned. If the assignment is for the whole bond/plan, please record the full bond/plan number for example 123456A 001 – 100. Please contact us first if you are unsure how many policies you have left in your bond.

Note that for the International Portfolio Bond, you must specify the highest numbered in force policies; for example if your bond has 100 segments, record OBL/OBC-1234567-0091 to 0100 to specify an assignment of 10 policies.

This Deed of Assignment is made the day of 20

between of

(hereinafter called "the Assignor") of the one part.

and of

Date of birth

and of

Date of birth

(hereinafter called "the Assignees") of the other part.

Whereas

1. The Assignor effected with Prudential International Assurance plc, the following policy or policies of assurance, namely:

Policy(ies) Number(ed)	Dated (Commencement Date)	On the life/lives of

(hereinafter called "the Policy").

2. The Assignor desires to assign the said Policy by way of gift into the joint ownership of the Assignees.

Now this deed witnesseth as follows:

1. The Assignor hereby assigns the Policy and all moneys receivable thereunder and all benefits secured thereby to the Assignees jointly and to the survivor of them and to his/her executors, administrators and assigns absolutely.

In witness whereof the parties hereto have set their hands the day and year first above written.

Signed and delivered as a deed (Signature of Assignor)

Date

By the above named (Print name of Assignor)

Deed of assignment – (assignment from single assignor to joint assignees) – continued

In the Presence of (Signature of Witness)

X

Date

D	D	M	M	Y	Y	Y	Y
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Print Name and Address of Witness

Postcode

Signed and delivered as a deed (Signature of Assignee)

X

Date

D	D	M	M	Y	Y	Y	Y
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By the above named (Print name of Assignee)

Note that for the International Portfolio Bond, the address of the First Assignee named here will be used for all correspondence.

In the Presence of (Signature of Witness)

X

Date

D	D	M	M	Y	Y	Y	Y
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Print Name and Address of Witness

Postcode

Signed and delivered as a deed (Signature of Assignee)

X

Date

D	D	M	M	Y	Y	Y	Y
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By the above named (Print name of Assignee)

In the Presence of (Signature of Witness)

X

Date

D	D	M	M	Y	Y	Y	Y
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Print Name and Address of Witness

Postcode



www.pru.co.uk/international

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