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Deferring a Policy Fund Entitlement – Letter to Trustees

For use with your own legal advisers in relation to the Lifestyle Trust, available with Quilter International and Utmost Wealth Solutions Bonds.

All references to Quilter International mean Quilter International Isle of Man Limited or Quilter International Ireland dac. All references to Utmost Wealth Solutions mean Utmost Limited or Utmost PanEurope dac.

The Lifestyle Trust is available for use with Quilter International bonds and Utmost Wealth Solutions bonds.

To the trustees of

(for example 'The John Brown Trust')

Policy number

Date

Section 1 – Trust details

Settlor's name

Trust date

Section 2 – Amendments to the second schedule

I would like the following Policy Fund(s), outlined within the Second Schedule of my Lifestyle Trust detailed above, to be amended as follows:

Policy fund	Total number of policies	Revised year of entitlement

Section 3 – Declaration

This letter confirms an amendment to the Policy Fund(s) listed above. This should be retained by the trustees with the original trust deed showing the amendment to the Second Schedule of my Lifestyle Trust. **I understand that I can only amend Policy Funds which have a vesting date after the date of this letter.**

Signature of Settlor

Name

Date

D	D	M	M	Y	Y	Y	Y
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Section 4 – Acknowledgement by trustees

We acknowledge receipt of this letter and accept the amendment proposed in section 2.

Signature of first trustee

Name

Date

D	D	M	M	Y	Y	Y	Y
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Signature of second trustee

Name

Date

D	D	M	M	Y	Y	Y	Y
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Signature of third trustee

Name

Date

D	D	M	M	Y	Y	Y	Y
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Signature of fourth trustee

Name

Date

D	D	M	M	Y	Y	Y	Y
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Calls may be monitored and recorded for training purposes and to avoid misunderstandings.

Quilter International's Hong Kong office: Unit 3704, Lee Garden One, 33 Hysan Avenue, Causeway Bay, Hong Kong. Tel: +852 3552 5888 Fax: +852 3552 5889. Authorised by the Insurance Authority of Hong Kong to carry on long-term business.

Quilter International Isle of Man Limited is registered in the Isle of Man under number 24916C. Registered and Head Office: King Edward Bay House, King Edward Road, Onchan, Isle of Man, IM99 1NU, British Isles. Tel: +44 (0)1624 655 555 Fax: +44 (0)1624 611 715. Licensed by the Isle of Man Financial Services Authority.

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Registered and Head Office address: Ashford House, 18-23 Tara Street, Dublin 2, D02 VX67, Ireland.

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25162/INT22-0022/January 2022