

international trusts



Application Form

To place an existing bond into trust

Assignment of a life policy (for use with Elite Bonds only)

This assignment made between:

(1) Name (the settlor)

Title (Mr/Mrs/Miss/Ms)

Family name

Forename(s)

Address

and

(2) Zurich Trust Limited (the Trustee)

Witnesses as follows:

- 1a The settlor is entitled to the policy of life insurance specified in schedule 1 (the policy).
- 1b The settlor as settlor assigns to the Trustee absolutely the policy and all sums and benefits assured by or payable under the policy to hold on the terms of and subject to the provisions of the Orbit Standard trust selected by the settlor in section 2. The settlor agrees to be bound by the table of fees set out in schedule 2.
- 1c The Trustee declares that it will hold the policy and all sums and benefits assured by or payable under the policy on the terms of and subject to the provisions of the Orbit Standard trust selected by the settlor in section 2.

2 Trust details

Please indicate trust required (tick one box only)

Life Interest trust (OSTL2) See 2a

Discretionary trust (OSTD2) See 2b

2a Life Interest trust (OSTL2) – beneficiaries

I wish to establish with the Trustee an Orbit Standard trust (reference OSTL2), the terms of which I have read and approved. I understand that any payments into the trust may be applied to purchase and maintain policies of life insurance from Zurich International Life; that the Trustee has discretion to decide which policies to effect and whether these will be on my life and/or the life of any beneficiary under the trust.

I understand that under the OSTL2 trust provisions I am entitled to the income from the trust during my lifetime with my widow/widower being entitled to the income from the trust during her or his lifetime, and thereafter the income is payable in accordance with the Trustee's discretion in a similar manner to the Trustee's discretion in relation to the capital of the trust.

In addition to both myself and my spouse, I understand that the beneficiaries include my children and issue now living or born hereafter and their respective spouses, widows or widowers and such persons as I add by deed. I also understand that I may by deed revoke any of the beneficiaries. (Please refer to page 4).

I am aware that I can provide the Trustee with a letter of wishes indicating how the trust fund might be dealt with on the death of myself and my spouse. (Please refer to page 5).

2b Discretionary trust (OSTD2) – beneficiaries

I wish to establish with the Trustee an Orbit Standard trust (reference OSTD2), the terms of which I have read and approved. I understand that any payments into the trust may be applied to purchase and maintain policies of life insurance from Zurich International Life; that the Trustee has discretion to decide which policies to effect and whether these will be on my life and/or the life of any beneficiary under the trust.

I understand that under the OSTD2 trust provisions the beneficiaries include myself, my spouse, my children and issue now living or born hereafter and their respective spouses, widows or widowers and such persons as I add by deed. In addition I note that I may by deed revoke any of the beneficiaries. (Please refer to page 4).

I also understand that under the trust provisions the Trustee has discretion to pay the income and the capital of the trust to one or more beneficiaries and I am aware that I can provide the Trustee with a letter of wishes indicating how the trust fund might be dealt with at any time. (Please refer to page 6).

3 Preferred fund Investment Adviser

I recommend that the Trustee appoint the following to act as fund Investment Adviser under the terms and conditions set out in the appointment of fund Investment Adviser form which I have completed and attached to this assignment.

Name of preferred fund Investment Adviser

(Please complete an appointment of fund Investment Adviser form).

For more information on appointing a fund Investment Adviser, please contact your Relevant Financial Professional.

4 Signatures and dates

Signature of settlor

Day	Month	Year
<input type="text"/> <input type="text"/>	<input type="text"/> <input type="text"/>	<input type="text"/> <input type="text"/>

Signed for and on behalf of the Trustee

Day	Month	Year
<input type="text"/> <input type="text"/>	<input type="text"/> <input type="text"/>	<input type="text"/> <input type="text"/>

Schedule 1

Policy No:

Schedule 2

Trust fees – (for the Elite range of Bonds only)

If the only assets held within the trust fund are Zurich International Life products the annual fee is currently 0.25% of the trust fund value, subject to a minimum charge of GBP150 (USD225) per annum. This will be deducted quarterly.

If the trust fund holds assets other than Zurich International Life products, whether with Zurich International Life products or not, the annual fee is currently 0.5% of the trust fund value, subject to a minimum charge of GBP250 (USD375) per annum. This will be deducted quarterly.

If the trust fund holds only an Elite International Bond the annual fee is currently GBP120 (USD180). This fee will be deducted monthly.

Trust fees for other types of policy are available on request.

Deed of nomination/revocation

To: Zurich Trust Limited

As Trustee of my Orbit Standard trust (the 'trust')

I understand that the existing beneficiaries of the trust are the following persons:

- a) Myself
- b) My spouse
- c) My children and issue now living or born hereafter and their respective spouses, widows or widowers.

In exercise of the power of nomination of beneficiaries given to me by clause 9 of the trust, I hereby nominate the following persons to be beneficiaries under the trust in addition to the existing beneficiaries:

Full list of additional beneficiaries

(A)

In exercise of the power of revocation of beneficiaries given to me by clause 9 of the trust, I hereby revoke the nomination of the following existing beneficiaries:

Full list of beneficiaries (if any) to be revoked.

(B)

Please note: If the settlor's name is included here he/she will be irrevocably excluded from benefiting under the trust for all future purposes.

In this deed, the expressions 'settlor' and 'beneficiary' each have the meaning given to them in the trust.

In witness of which I have executed this deed this day of month year

Signed and delivered as a deed by the settlor in the presence of

Signature of settlor	Day	Month	Year
	<input type="text"/>	<input type="text"/>	<input type="text"/>

Signature of witness	Day	Month	Year
	<input type="text"/>	<input type="text"/>	<input type="text"/>

Full name and address of witness

Title (Mr/Mrs/Miss/Ms)	Family name
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Forename(s)

Address

Notes

- 1 Insert full names of additional beneficiaries in box A.
- 2 Insert full name of beneficiaries (if any) whose nominations are to be revoked in box B.
- 3 Date and sign this form in the presence of an independent witness who should also sign and complete their address.

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ZURICH

Zurich International Life Limited
provides life assurance and
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business name of Zurich International
Life Limited which is regulated by
the Financial Services Authority for
UK business only.

Representation of the Zurich Financial Services Group

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