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# Quilter

# Deferring a Policy Fund Entitlement – Letter to Trustees

*For use with your own legal advisers in relation to the Lifestyle Trust*

To the trustees of

(for example 'The John Brown Trust')

Bond ID

OR

Bond account number

[illegible]

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:

[illegible]

### 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

### 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

Signature of second trustee

Name

Date

Signature of third trustee

Name

Date

Signature of fourth trustee

Name

Date

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