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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

This is a sample letter to request a deferral of the vesting date for one or more policy funds in a Lifestyle Trust. The settlor may write their own letter if they prefer. For dates, use the format dd/mm/yyyy. This letter does not need to be sent to Quilter.

To the trustees of

(for example 'The John Brown Trust')

Bond ID

OR

Bond account number

A C -

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:

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

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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

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Signature of second trustee

Name

Date

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Signature of third trustee

Name

Date

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Signature of fourth trustee

Name

Date

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