

Deed of assignment

Draft deed

This deed of assignment is made on _____ / ____ / ____ (DD/MM/YYYY)

Between the current owner(s)

Name _____ Date of Birth ____ / ____ / ____ (DD/MM/YYYY)

Address _____

Postcode _____

and Name _____ Date of Birth ____ / ____ / ____ (DD/MM/YYYY)

Address _____

Postcode _____

(together called the 'assignors')

and the new owner(s)

Name _____ Date of Birth ____ / ____ / ____ (DD/MM/YYYY)

Address _____

Postcode _____

and Name _____ Date of Birth ____ / ____ / ____ (DD/MM/YYYY)

Address _____

Postcode _____

(together called the 'assignees')

Because Liverpool Victoria Financial Services Limited (LV=) is a mutual, some of our policyholders are eligible to be members of LV=. By being a member, policyholders are entitled to exclusive member benefits and voting rights for the company. You can find more information about this at [LV.com/members](https://www.lv.com/members).

In order for LV= to grant membership to either / both of the new policyholder(s) (the Assignees), we need to understand the relationship between them and the current policyholder(s). In respect of each Assignee, please confirm if they are the:

- spouse (including common-law spouses),
- partner (as defined by the Civil Partnership Act 2004) and/or
- child (excluding step-child)

in relation to the existing Policyholder(s).

Assignee 1: _____ Yes No

Assignee 2: _____ Yes No

WITNESSES as follows:

The assignors HEREBY ASSIGN the property (detailed below), all money payable or to become payable under the property, and full benefit of the property to the assignees TO HOLD absolutely. The assignees will be responsible for paying all premiums due on the property from the date of this deed.

Policy (or plan) to be assigned:

Name of provider

Policy (or plan) number

Start date of the policy (or plan)

(called the 'property')

The assignors make this assignment as a: (please tick one box only)

Gift Sale of policy (or plan)

The assignees take ownership of the property as: (please tick one box only)

Sole owner Joint tenants (in Scotland, this is joint owners with survivorship clause)

Tenants in common (in Scotland, this is owners in common)

Current trustees of the trust detailed below

The trust was created by (settlor's name(s))

on / / (DD/MM/YYYY)

It is hereby certified that this instrument falls within Category L in the Schedule to Stamp Duty (Exempt Instruments) Regulations 1987.

Assignee consent to membership

If the product you are transferring is a member qualifying product, as part of the transfer we will look to grant membership to each assignee in accordance with our membership eligibility criteria. By signing this form, you acknowledge and confirm:

- that if you are eligible you will become a member of Liverpool Victoria Financial Services Limited ("LV="), a company limited by guarantee, registered in England and Wales with registered number 12383237;
- your membership will be governed by the Companies Act 2006 and LV='s articles of association which are available to view at LV.com/about-us/company-information/corporate-governance or in hardcopy on request;
- your membership shall commence from the date LV='s register of members is updated to include your details and shall terminate in accordance with LV='s articles of association;
- in the unlikely event LV= were to be wound up during your membership, or within one year after you cease to be a member, you undertake to contribute an amount to the assets of LV= not exceeding one penny. Such amount would not be required unless called for by a liquidator; and
- in the case of policies where the intended policyholder is less than 18 years of age as at the date of this form, you are either the parent, legal guardian or trustee of the policyholder or other person who has been nominated by the policyholder to become a member of LV= on their behalf.

Now sign the deed below. You must sign in the presence of a witness, who also signs and adds his/her full name and address. Your witness must be physically present in the same place as you at the time you sign. Your witness should be independent to all of you, and not otherwise involved in this assignment deed. (We can't process this assignment unless this deed is signed and witnessed).

In witness whereof the parties hereto have executed and delivered this Deed on the date given above.

Signed (1st assignor):

Signed (witness):

Name of witness:

Address of witness:

Postcode

Signed (2nd assignor):

Signed (witness):

Name of witness:

Address of witness:

Postcode

Signed (1st assignee):

Signed (witness):

Name of witness:

Address of witness:

Postcode

Signed (2nd assignee)

Signed (witness):

Name of witness:

Address of witness:

Postcode

LV= may use the information given to make searches at credit reference agencies and other organisations that hold your information (such as from the electoral roll) to check your identity. The agencies and other organisations may keep records of these searches. LV= may use scoring methods to check your identity and may ask you for supporting documents.

Find out how we use your personal information, and what rights you have by visiting [LV.com/dataprotectionlife](https://www.lv.com/dataprotectionlife). This includes who we are, how long we hold your information, what we do with it and who we share it with. Please ensure that you advise anyone else whose personal details are related to your policy or plan where they can find this information. Please let us know if you'd like us to send you a copy, or have any questions.

You can get this and other documents from us in Braille or large print by contacting us.



Liverpool Victoria Financial Services Limited: County Gates Bournemouth, BH1 2NF.

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