The VitalityLife Absolute Trust

The VitalityLife Discretionary Trust

A guide to completing your Personal Protection Plan Trust (Absolute or Discretionary) form.

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- The **Settlor(s)/Donor(s) (plan owner(s))** need to sign to confirm that they understand the key trust provisions, before continuing to complete the form.

Part A -

- The **Date** the trust is created must be entered.
- The **Name and Address** of the **Settlor/Donor (Plan Owner(s))** and any **Trustee(s)** must be provided in the relevant boxes.
- **Trustee(s)** must also provide their **Date of Birth** and their **email address**.

Part B -

- **B1)** The **Plan number** must be entered.
- **B2)** The name of the **Life assured** must be entered.
- **B3)** Initial here if you would like the death benefits to go to the **surviving Settlor**. (Joint plans only)
- **B4)** Either option A or B must be initialled by the **Settlor(s)/Donor(s)**.

Part C -

- **Absolute Trust**
  Beneficiary(ies) must be named. Where there is more than one, the percentage **share** they are each to receive must be stated and **must add up to 100%**.
- **Discretionary Trust**
  Additional potential Beneficiaries can be named here if they do not fall within the definitions 2a) to f). (Potential beneficiaries can also be notified, in writing, to the trustees at any time.)

Part J -

- In the **Relevant Spaces** please ensure that the **Settlor(s)/Donor(s)** and **Trustee(s)** have been named and signed.
- Each signature must be accompanied by an **Independent Witness Name, Address, and Signature.**
- **The witness must be an independent person (not the settlor, trustee, beneficiary, or a family member) over the age of 18. You can have the same witness for multiple signatures**.

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