

AVIVA Online Trust Data Capture Form

Please complete and email this document to serviceteam@lifequote.co.uk before the telephone application is completed. If we receive this after the booked appointment, we may not be able to use the online trust option for this application.

All fields are mandatory unless stated optional.

Policy Holder Name(s):

LifeQuote Case Number:

The death benefit will always be given away to the beneficiaries you name	
<p>Is terminal illness to be gifted?</p> <p>You can choose whether you want to keep the terminal illness benefit yourself or give it away to the beneficiaries you name. It is important to remember that if you choose to keep this for yourself the value of the terminal illness benefit will be included in your estate for inheritance tax purposes. It is not possible to change your decision once the trust is in force.</p>	
<p>Is critical illness to be gifted?</p> <p>You can choose whether you want to keep the critical illness benefit yourself or give it away to the beneficiaries you name. It is not possible to change your decision once the trust is in force. There may be tax implications if you choose to keep it for yourself.</p>	
<p>Is total permanent disability to be gifted?</p> <p>You can choose whether you want to keep the permanent disability benefit yourself or give it away to the beneficiaries you name. It is not possible to change your decision once the trust is in force.</p>	
If Global Treatment and/or Fracture Cover have been selected, please remember that they cannot be given away.	

<p>TRUSTEES</p> <p>You, as a policyholder, will automatically be appointed as a trustee. We would strongly recommend that you appoint at least one further trustee. You can appoint a further 2 trustees online. If you require more than 2 additional trustees then you should consider completing a paper trust. It is possible to add and remove further trustees later on.</p> <p>The settlor passes the legal ownership of the property to the trustees. The trustees are legally bound to look after the property in line with the terms of the trust for the beneficiaries. Under the Aviva trust you (as the settlor) will automatically be a trustee. We strongly recommend that you appoint at least one other trustee to help you look after the trust.</p> <p>If you do not wish to add any additional trustees, please leave the relevant fields blank.</p>

Additional Trustee 1:	
Title	
First Name	
Middle Name	
Last Name	
Date of Birth dd/mm/yyyy	
We need this for verification purposes	
The Trustee must be a resident in either the UK, Channel Islands, Isle of Man or Gibraltar. Please use the paper trust forms if you wish to assign a trustee who resides outside of the UK, Channel Islands, Isle of Man or Gibraltar.	
Address Line 1	
Address Line 2 (optional)	
Address Line 3 (optional)	
Town/City	
County (optional)	
Country	
Postcode	
Mobile (optional)	
Landline (optional)	
Email address (optional)	
We use this email address to provide the customer with access to MyAviva and Aviva DigiCare+ where applicable, so your client can access their policy documents and manage their health and wellbeing throughout the policy term.	

Additional Trustee 2:	
Title	
First Name	
Middle Name	
Last Name	
Date of Birth dd/mm/yyyy	
We need this for verification purposes	
<p>The Trustee must be a resident in either the UK, Channel Islands, Isle of Man or Gibraltar. Please use the paper trust forms if you wish to assign a trustee who resides outside of the UK, Channel Islands, Isle of Man or Gibraltar.</p>	
Address Line 1 The Trustee must be a resident in either the UK, Channel Islands, Isle of Man or Gibraltar. Please use the paper trust forms if you wish to assign a trustee who resides outside of the UK, Channel Islands, Isle of Man or Gibraltar.	
Address Line 2 (optional)	
Address Line 3 (optional)	
Town/City	
County (optional)	
Country	
Postcode	
Mobile (optional)	
Landline (optional)	
Email address (optional) We use this email address to provide the customer with access to MyAviva and Aviva DigiCare+ where applicable, so your client can access their policy documents and manage their health and wellbeing throughout the policy term.	

BENEFICIARIES

These are the people who will receive the benefits from the trust.

You need to confirm who you want to receive the benefits from the trust. You must include at least one person and can include up to 6 people. Beneficiaries can be changed at anytime if required. If you want to choose more than 6 beneficiaries then you'll need to complete a paper trust.

Beneficiary 1:

Type of beneficiary	
If individual	
Title	
First Name	
Middle Name	
Last Name	
Percentage (%)	
If charity	
Charity name	
Percentage (%)	

Beneficiary 2:

Beneficiary 3:	
Type of beneficiary	
If individual	
Title	
First Name	
Middle Name	
Last Name	
Percentage (%)	
If charity	
Charity name	
Percentage (%)	

Beneficiary 4:	
Type of beneficiary	
If individual	
Title	
First Name	
Middle Name	
Last Name	
Percentage (%)	
If charity	
Charity name	
Percentage (%)	

Beneficiary 5:	
Type of beneficiary	
If individual	
Title	
First Name	
Middle Name	
Last Name	
Percentage (%)	
If charity	
Charity name	
Percentage (%)	

Beneficiary 6:	
Type of beneficiary	
If individual	
Title	
First Name	
Middle Name	
Last Name	
Percentage (%)	
If charity	
Charity name	
Percentage (%)	

All the information required has now been completed. We will prepare a draft trust based on the information you've provided. We'll make the draft available to you, please take the time to review it.

If the draft meets your requirements then we will save it until we are provided with a start date. If you need to change anything then please let us know.

Once you provide a start date we will regard that as your instruction and confirmation that you wish the policy to be issued subject to the trust. The trust will become active and Aviva will then issue a copy of the trust to the policy holder/s and the appointed trustees. The trust should be kept safe for future reference. If any of the appointed trustees do not accept their appointment then Aviva will remove them as trustees and inform this has been done. Different trustees can still be appointed.

To be read and accepted by the Adviser

I confirm that:

- » The information provided as part of this draft online trust reflects the instructions given to me by my client(s).
- » I have provided all required information to my client(s) to allow an informed decision to be made as to the suitability of the draft trust.
- » I have explained that by providing a start date the trust will become effective and cannot then be cancelled.