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Completing Trust Forms

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Completing Trust Forms

Trust forms can be simple to complete despite some of the legal terms and language used. Below, we have shown an example of how simple it is to complete one of our most frequently used forms. (The Legal & General Trust Schedule including Trust Provisions - W8102.)

The details provided on the form are from Mr John Smith who wishes his wife (Mrs Jane Smith) and his existing children to be the beneficiaries of his policy.

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He also wants to ensure that should he have any more children in the future that they too could be entitled to a share of any benefit paid out. The trust automatically makes John Smith a trustee and the additional trustees are his brother David Grant Smith and a family friend, Sheila Grace Mitchell. The form has been witnessed by Mrs Rachel Harris.

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For full details, please refer to "A Guide to Trusts" W5947