## IMPORTANT INFORMATION

This information may be downloaded to your PC in whole or in part provided that any reproduction or copy, or any derivative, is true to the original, and it is EITHER used for personal use OR in support of an Agency Agreement with Legal & General. Professional advisors who are properly authorised may use it in the process of giving financial advice relating to Legal & General products.

Copies or derivatives of the document may not be sold, marketed, or used for commercial gain.

Notwithstanding the above, Legal & General Assurance Society Ltd. retains ownership of copyright in all such reproductions, copies or derivatives.

Copyright © Legal & General Assurance Society Limited, August 1998. Temple Court, 11 Queen Victoria Street, London EC4N 4TP. All rights reserved.

## Completing Trust Forms

Legal & General Assurance Society Limited. Registered in England No. 166055 Registered Office: Temple Court, 11 Queen Victoria Street, London EC4N 4TP Regulated by the Financial Services Authority A member of the Association of British Insurers www.legalandgeneral.com



W8344 03/02 Approval Number: H8210 Expiry Date: 03/04/03

## **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.

	e Legal & General Tru Belaniar (1999				
	olicy is which Treat Schoolade in the	INSTRUME LEVEL TE	RM ASSURAN	ĴE	
ONTRACT NAME	e incorporated all mane and address of person(c) beforing this Trees, hereinative merein is the Geomet(c).	JOHN SMITH 13 GOODWILL STREET, READING,		ADING,	
IAME OF PERSON		BERKSHIR	E	R611 45R	
EFFECTING THE		Second Granes: Tel 414	кс		
POLICY		Seldown			
This is likely to be				Potentik	
the life assured)	ht submitting the application inertic share policylics. Net wish to make sevel/consisten, and are permassis surred in ques- mont 4 helper. Trustents) of the policylics for the feetherate given is greatered 3 helper. Der turns read and agree with the flow Provision shows to the left. User certify that the Deckeration of flow help without Caregory N of the februilate to the starsp Duty (Damage Instrumenta).				
	Regulations (199		Second Grantee		
	First/Single-Grantice		Signerer of Counce		
John Smith Signs —	- Ush Z	- Al Dur			
WITNESS TO JOHN	Planic		Signal are of William		
SMITH SIGNATURE & NAME	- RACHEL HARRIS 26 THE DRIVE, READING,				
	BERKSHIRE				
Cherry Silor pull concept of she particle particle year many to bandle phone she protect plan des more interest, plan Silor des more interestinger directer particles and plan directer particles and plan directer particles and plan directer particles and plan directer	BERKSHIRE My Wife, Jane Smith ( and Robin Christoph	50%) and my CH IER SMITH (25%)	Ildren Alice	wendy smith (25%)	
benefact place (see faile) in the signal of your with a place (see day near investigation), for the signal per instances of the signal place interaction of the signal place interaction of the sadding with a stand of generation.	BERKSHIRE My Wife, Jane Smith ( And Robin Christoph	50%) and my CH IER SMITH (25%)	Ildren Alice	wendy smith (25%)	
bencher provide years man be benote from up for four data more interest, for any percentage observe and four the total of the adding up to a total of status. These over also percept years being up to a start of status. These over also percept years four over also percept years four over also percept years four over also percept years four top retrained any over all four top retrained any over all four top index on the percent percent and percentage.	BERKSHIRE My Wife, Jane Smith ( and Robin Christoph My Wife and Childre	50%) and my CH IER SMITH (25%) EN			
benchart provide years man benchart years with respect to the other stress interest, J.A. Barrow years interesting of our and long with the stressing of stressing of the stressing of stressing of the stressing of stressing from other provide years interesting of the stressing of stressing from the provide years into form the provide years into any externers, local life oblighter and the thought them.	BERKSHIRE MY WIFE, JANE SMITH ( AND ROBIN CHRISTOPH MY WIFE AND CHILDRE	50%) and my CH IER SMITH (25%) EN	on in press of the	un in the formal kinglenet	
Learning (specify year in an analysis) from the pathogeneous processing of the second processing of determined on the processing of determined on the processing of determined on the processing of the process	BERKSHIRE MY WIFE, JANE SMITH ( AND ROBIN CHRISTOPH MY WIFE AND CHILDRE	50%) and my CH IER SMITH (25%) EN	Second Addition	LA GRACE MITCHELL	
benchar person and	BERKSHIRE MY WIFE, JANE SMITH ( AND ROBIN CHRISTOPH MY WIFE AND CHILDRE DAVID GRANT S 112 PRIMROSE E	50%) and my CH HER Smith (25%) En Smith Drive, sonning	SHE 94	LA GRACE MITCHELL DRCHARD ROAD	6RF
YOU SHOULD NORMALL	BERKSHIRE MY WIFE, JANE SMITH ( AND ROBIN CHRISTOPH MY WIFE AND CHILDRE DAVID GRANT S 112 PRIMROSE D	50%) and my CH IER SMITH (25%) EN	SHE 94 ( CAF	LA GRACE MITCHELL DRCHARD ROAD RDIFF CF4	6RF
You should normali Appoint at least 2	BERKSHIRE MY WIFE, JANE SMITH ( AND ROBIN CHRISTOPH MY WIFE AND CHILDRE DAVID GRANT S 112 PRIMROSE D BERKSHIRE	50%) and my CH HER Smith (25%) En Smith Drive, sonning	SHE 94	LA GRACE MITCHELL DRCHARD ROAD RDIFF CF4	6RF
YOU SHOULD NORMALL	BERKSHIRE MY WIFE, JANE SMITH ( AND ROBIN CHRISTOPH MY WIFE AND CHILDRE DAVID GRANT S 112 PRIMROSE D BERKSHIRE	50%) and my CH HER Smith (25%) En Smith Drive, sonning	SHE 94 CAF	LA GRACE MITCHELL DRCHARD ROAD RDIFF CF4	6RF
You should normali Appoint at least 2	BERKSHIRE MY WIFE, JANE SMITH ( AND ROBIN CHRISTOPH MY WIFE AND CHILDRE MY WIFE AND CHILDRE DAVID GRANT S 112 PRIMROSE D BERKSHIRE	50%) and my CH HER Smith (25%) En Smith Drive, sonning	SHE SHE CAF	LA GRACE MITCHELL DRCHARD ROAD RDIFF CF4	6RF

٦

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.

The dates	5. Deed of Amignetical Antignation				
of the last committee of the	9" This koop newsychologies to make the fermerer lie function of the fermerer lie function and the function of the fermerer is and the fermerer is an end to be for the fermerer is and the fermerer is an end to be for the fermerer is an end to be end to be for the fermerer is an end	de ul			
mus origin ori	Personal for the said Linear solar and francesco	One of B1 Treasure of the other pair and baselse manual and deferred as a			
SIGNED BY	Deine ( S. )	Research Additional Transferst Valuation	SIGNED BY SHEILA		
David G.SMITH	1 Anic	Alder Alterall -	G.MITCHELL		
WITNESS	- R.Manis	Eldu Mitchou R. Hanis -			
SIGNATURE	Full name and address of Witness.	K.Manis -	- WITNESS		
WITNESS NAME	MRS. RACHEL HARRIS	MRS. RACHEL HARRIS	SIGNATURE		
& ADDRESS	26 THE DRIVE, READING, BERKS	26 THE DRIVE, READING, BERKS	WITNESS NAM		
		E ME DAWE, READING, BERKS	& ADDRESS		
	third address tracks income	Frends additional franks: Sprange			
	Restore of These				
		Spinor of Kinese			
	Foll some and solvies of Warran				
		Foll States and address of Witness			
	Same and the second second				
	Wind/Single Grantee	Second Grantee			
SIGNED BY	- Au Suit	Second Granie			
John Smith					
WITNESS	- Alm Suin _ R. Harris	Paperson of Kinese			
SIGNATURE	Full ments and address of Witness				
WITNESS NAME	MRS. RACHEL HARRIS	full tene (a) alitys of Kinese			
& ADDRESS -	26 THE DRIVE, READING, BERKS				
	Whenever the Generative are the Generative of the Foli-prine) of the Schedule harmon and hold the Policytical space the trans and not care	Alexandra (Barran Carlos Car			
	The Schedule burners and head the Commerce of the Policytice) of not compared burners and head the Policytical space the input and not com- net down	I with and subject to the powers and provision therein			
	and any sheetroan of computing the Full-Principles in the Transport	office to matter the memory prystill table the Policytical			
	status same the Trashops upon the Trash and with and sufficient to	the mount for Policylics' cruss the Transes in hold day			
	It is insulty worthfied that this instrument is its wides from the second	(The Schedule of the Schedule			
	It is family confident the near and the Treners leaving scores were and provide and provide and solution which and adapting at the family confident the family instances info window Congrey A of the Schwidz in the Sump Darp (Darrage Instruments) Regulations (99). In without without the mid partice in these provides from family and part family and part family adapting The felledake increase for an end partice in these provides from family and part family and part from above solution				
	(1994) - Record and an indicate referred to:	and one base transfer the day and year first above websets			
the completion by	Office: Legal & General Assurance Society Limited Date	E Policy No:			
and the set					
	land & Connect				
	Legal & General Assurance Society Lie Reprint in England No. 10605 Registernal Office: Teamle Cover. 1	nikud. 5			
	Registered of England No. 16605 Registered Office: England Coart, 11 Queen Versiti, 5th A member of the Association of British to wrww.legalandgement.com	ort, London BC-05 offe			

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