
Adding a gifted benefit

You should only use this form with the Split Trust and Split Trust +30 forms dated 01.03, 06.04, 01.05, 08.05, 02.06 or 03.06 on the back of the form.

You should use this form when your plan is already written under Trust and you want to include a new cover as a Gifted Benefit. Gifted Benefits are the covers within your plan that you want to give away. If you would like your new cover to be a Gifted Benefit please complete this form and send it to your Trustees. If you would like your new cover to remain a Retained Benefit you don't need to do anything. Your new cover is automatically included as a Retained Benefit under this Trust. Retained Benefits are the covers within your plan that you want to keep for yourself.

Your trust details ("the Trust")

Plan number

Declaration of Trust signed

Date

Settlor 1

Settlor 2

Name

Name

Address

Address

Postcode

Postcode

The following is written as if one person is the plan owner. If there are two plan owners, please read 'I' as 'we' and 'me' as 'us'.

I refer to the Trust in your favour as Trustees, relating to the above numbered Bright Grey plan. I hereby notify you that I have added the benefit detailed overleaf to the plan, and this benefit is to be regarded as a Gifted Benefit in accordance with the Trust.

Settlor 1

Settlor 2

Signature

Signature

Date

Date

Under 'Benefit' you should put the name of the benefit you wish to give away exactly as it is shown on your quote or cover summary, for example 'Life or Critical Illness Cover'. Under 'Person covered' you should put only the name of the person covered by that benefit as shown on your quote or cover summary.

Under 'Named beneficiaries' you should put the full name of the person you wish to receive the 'Benefit' named in that section (1 or 2). If you name more than one person, you should put the share each is to receive under 'Appropriate share'.

1	Benefit	Person covered	Benefit amount

Named beneficiaries	Appropriate share

2	Benefit	Person covered	Benefit amount

Named beneficiaries	Appropriate share