Changing or adding a beneficiary

When to use this form

- Different trusts have different terms and conditions when it comes to changing or adding beneficiaries. It's important to refer first to the terms and conditions of your particular trust ('the trust provisions') before completing this form, to understand any restrictions which may apply.
- As a trust is a legal document, any changes you need to make must be done via a 'deed'. This provides an official record of the changes. You can use this form to let us know about the changes required, which then allows us to prepare the relevant deed(s) for you.
- Trusts can be complicated, so this form is intended to cater for simple changes. There may be some scenarios in which we need additional information or where we'd recommend you seek independent legal advice. If that's the case, we'll let you know.

If you have any questions or need help completing this form, please contact us using the details provided at the end – we'll be happy to help.

Policy(s) affected

Full name of settlor

The 'settlor' is the policyholder who originally placed the policy in trust – please provide their full name in BLOCK CAPITALS:

Zurich policies covered by this instruction

Please provide the policy number(s) covered by this instruction:

Important information about trusts:

If you have a Discretionary Trust and wish to appoint your spouse or civil partner as a beneficiary, or if you are appointing a current trustee as a beneficiary on a Relevant Life Trust, you'll first need to appoint an additional independent trustee – if you don't already have one.

Changes required

New or existing beneficiary	Relationship	Percentage share
Please provide the FULL name(s) in BLOCK CAPITALS of any new beneficiaries you'd like to appoint. For completeness, please also include the name(s) of any existing beneficiaries who'll remain on the trust.	Please provide details of the relationship of the beneficiary to the settlor (the person who set up the trust).	Please specify the share of the trust (in %) that each beneficiary will be allocated. If you've added a new beneficiary, you'll need to adjust each share to add up to a total of 100%.

Returning this form

Please return both pages of the completed form to us – you can either email us a scanned copy or send a hard copy in the post. Please make sure you use the correct email or postal address for your policy, as shown below.

If you'd prefer to use email, we'd always recommend you use a secure, encrypted service and retain an original copy of the document, just in case we need it in the future.

If your policy begins with 'PR':

Email us at
life.service@uk.zurich.com

Call us on
0370 850 5682
Monday to Friday 8.30am to 5.30pm (except bank holidays). We may record or monitor calls to improve our service.

Write to us at
Zurich Assurance Ltd
Protection Operations
PO Box 4157
Swindon
SN4 4QB

If your policy doesn't begin with 'PR':

Email us at
zurich.customer.service@uk.zurich.com

Call us on
0370 333 1500
Monday to Friday 8.30am to 5.30pm (except bank holidays). We may record or monitor calls to improve our service.

Write to us at
Zurich Assurance – InForce
Unity Place
1 Carfax Close
Swindon
SN1 1AP