

Draft notice/deed of appointment of beneficial interest

This Notice / Deed of Appointment is provided as a draft to be considered by you and your professional adviser. We can accept no responsibility for any legal, tax or any other consequences arising out of you executing this notice / deed, or for ensuring that the notice / deed meets with your requirements.

THIS NOTICE/DEED OF APPOINTMENT is made on (dd/mm/yyyy)

By:

Settlor 1
Settlor 2

Full name

Residential address

WHEREAS

- 1 The Settlor(s) created a settlement on the (dd/mm/yyyy) (the "Settlement").
- 2 In this notice / deed the terms "Settlor", "Beneficiaries" and "Trust Fund" shall have the same meanings as in the Settlement.
- 3 The Settlor wishes to exercise the power of appointment conferred on him under the terms of the Settlement to appoint the Trust Fund to be held on trust subject to the terms of the Settlement for the benefit of the following persons (the "Beneficiaries").

Beneficiary 1
Beneficiary 2

Full name

Residential address

Date of birth (dd/mm/yyyy)

Country or countries of tax residence

Tax Identification Number (TIN)

If unavailable, provide a functional equivalent (e.g. National Insurance Number, Social Security Number, resident registration number)

Percentage Share

 %

 %

	Beneficiary 3	Beneficiary 4
Full name	<input style="width: 100%; height: 25px;" type="text"/>	<input style="width: 100%; height: 25px;" type="text"/>
Residential address	<input style="width: 100%; height: 50px;" type="text"/>	<input style="width: 100%; height: 50px;" type="text"/>
Date of birth (dd/mm/yyyy)	<input style="width: 25px; height: 20px;" type="text"/> / <input style="width: 25px; height: 20px;" type="text"/> / <input style="width: 50px; height: 20px;" type="text"/>	<input style="width: 25px; height: 20px;" type="text"/> / <input style="width: 25px; height: 20px;" type="text"/> / <input style="width: 50px; height: 20px;" type="text"/>
Country or countries of tax residence	<input style="width: 100%; height: 25px;" type="text"/>	<input style="width: 100%; height: 25px;" type="text"/>
Tax Identification Number (TIN)	<input style="width: 100%; height: 25px;" type="text"/>	<input style="width: 100%; height: 25px;" type="text"/>
If unavailable, provide a functional equivalent (e.g. National Insurance Number, Social Security Number, resident registration number)		
Percentage Share	<input style="width: 50px; height: 20px;" type="text"/> %	<input style="width: 50px; height: 20px;" type="text"/> %

NOW THIS NOTICE/DEED WITNESSETH

The Settlor in exercise of the power of appointment conferred on him under the terms of the Settlement hereby appoints and declares that the Trust Fund shall be held on trust subject to the terms of the Settlement for the Beneficiaries.

This notice / deed may be revoked at any time by the Settlor during his lifetime.

	Settlor 1	Settlor 2
Full name	<input style="width: 100%; height: 25px;" type="text"/>	<input style="width: 100%; height: 25px;" type="text"/>
Signature	<input style="width: 100%; height: 50px;" type="text"/>	<input style="width: 100%; height: 50px;" type="text"/>
 Witness		
Full name	<input style="width: 100%; height: 25px;" type="text"/>	<input style="width: 100%; height: 25px;" type="text"/>
Residential address	<input style="width: 100%; height: 50px;" type="text"/>	<input style="width: 100%; height: 50px;" type="text"/>
Signature	<input style="width: 100%; height: 50px;" type="text"/>	<input style="width: 100%; height: 50px;" type="text"/>

DATA PRIVACY

We take the responsibility of handling your personal data very seriously and we will only ask you for details required to process your requests to us. Please be aware of our privacy policy – please visit www.fpinternational.com/legal/privacy-and-cookies to view the full policy, or this can be provided on request from our Data Protection Officer.

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