

Flexible Future Benefits Trust: Option Form

This form should be used to give instruction as to what will happen to the Policy Fund when it reach its entitlement date.

Please complete all sections in **Part A** and select one option from **Part B**.

Part A

Trust Name	<input type="text"/>		
Bond Number	<input type="text"/>	Policy Numbers	<input type="text"/>
Policy Fund	<input type="text"/>	Entitlement date	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>

A separate Option Form **must** be completed for each Policy Fund that the settlor has become entitled to.

Part B

The settlor of the trust is due to become entitled to the Policy Numbers of the above numbered Bond which were allocated to a Policy Fund when the trust was established.

The settlor wishes to take the following option in relation to the entitlement of the above Policy Fund on the entitlement date. (Tick as appropriate)

- ☐ **Option 1:** The settlor wishes to surrender the Policy Numbers to which they will become entitled at the entitlement date and we enclose a Request for Payment on Surrender Form for the Policy Numbers in this Policy Fund to be surrendered on the entitlement date.
- ☐ **Option 2:** The settlor wishes to defer the entitlement date of the Policy Fund to the following date (insert year only)
- ☐ **Option 3:** The settlor wishes for the beneficial ownership of the Policy Numbers to revert to him/her at the entitlement date and continue to be held by the trustees on bare trust until such time as the settlor instructs the trustees to surrender or assign the Policy Numbers.

Part C: Signed and delivered by

	Settlor	Trustee
Full name	<input type="text"/>	<input type="text"/>
Signature	<input type="text"/>	<input type="text"/>
	Trustee	Trustee
Full name	<input type="text"/>	<input type="text"/>
Signature	<input type="text"/>	<input type="text"/>
Date (dd/mm/yyyy)	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>

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