Trust Data Capture Form

Please read the Trust Fact Sheet prior to completing this form. The Fact Sheet details why it is important to place protection policies in Trust and some guidance on the role of a Trustee.

Your Full Name

What is a Trustee?
The Trustee's role is to manage and look after assets left in the Trust on behalf of the Beneficiaries. We recommend that you list at least 2 additional Trustee's.

Your Trustee's Details

Trustee 1

Full Name	Mr/Mrs/Miss
Date of Birth	
Address	
Postcode	
Contact Numbers	
Email Address	
Relationship to Policy Holder	

Trustee 2

Full Name	Mr/Mrs/Miss
Date of Birth	
Address	
Postcode	
Contact Numbers	
Email Address	
Relationship to Policy Holder	

Trustee 3

Full Name	Mr/Mrs/Miss
Date of Birth	
Address	
Postcode	
Contact Numbers	
Email Address	
Relationship to Policy Holder	

Trustee 4

Full Name	Mr/Mrs/Miss
Date of Birth	
Address	
Postcode	
Contact Numbers	
Email Address	
Relationship to Policy Holder	

Beneficiary Details

Confirm who you would want the policy benefits to be left to.

Beneficiary 1

Full Name	
Date of Birth	
Address	
Postcode	
Contact Numbers	
Email Address	
Relationship to Policy Holder	
Percentage	

Beneficiary 2

Full Name	
Date of Birth	
Address	
Postcode	
Contact Numbers	
Email Address	
Relationship to Policy Holder	
Percentage	

Beneficiary 3

Full Name	
Date of Birth	
Address	
Postcode	
Contact Numbers	
Email Address	
Relationship to Policy Holder	
Percentage	

Beneficiary 4

Full Name	
Date of Birth	
Address	
Postcode	
Contact Numbers	
Email Address	
Relationship to Policy Holder	
Percentage	

Beneficiary 5

Full Name	
Date of Birth	
Address	
Postcode	
Contact Numbers	
Email Address	
Relationship to Policy Holder	
Percentage	