

## LETTER OF WISHES FOR YOUR BEAGLE STREET LIFE POLICY TRUST

### FROM:

Policyholder Name \_\_\_\_\_  
Address Line 1 \_\_\_\_\_  
Address Line 2 \_\_\_\_\_  
Address Line 3 \_\_\_\_\_  
POSTCODE \_\_\_\_\_

Please be aware that these notes are intended for general guidance only and should not be relied upon in place of specialist legal and tax advice.

### To:

First Trustee Name \_\_\_\_\_  
Address Line 1 \_\_\_\_\_  
Address Line 2 \_\_\_\_\_  
Address Line 3 \_\_\_\_\_  
Postcode \_\_\_\_\_

Your trust form will have up to four named Trustees.

The names you add to this section should correspond to the names listed on your Life Policy Trust.

Second Trustee Name \_\_\_\_\_  
Address Line 1 \_\_\_\_\_  
Address Line 2 \_\_\_\_\_  
Address Line 3 \_\_\_\_\_  
Postcode \_\_\_\_\_

Third Trustee Name \_\_\_\_\_  
Address Line 1 \_\_\_\_\_  
Address Line 2 \_\_\_\_\_  
Address Line 3 \_\_\_\_\_  
Postcode \_\_\_\_\_

Fourth Trustee Name \_\_\_\_\_  
Address Line 1 \_\_\_\_\_  
Address Line 2 \_\_\_\_\_  
Address Line 3 \_\_\_\_\_  
Postcode \_\_\_\_\_

**POLICY NUMBER(S)** \_\_\_\_\_

If you have more than one Beagle Street policy placed in Trust, then you can list all of the policies numbers here.

**Whilst I appreciate that it is ultimately your decision, these are the guidelines that I would like you to follow when distributing policy proceeds from my Beagle Street life policy trust.**

### PRIORITIES AMONGST BENEFICIARIES:

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Please insert details of the beneficiaries you would like the Trustees to consider distributing the lump sum to.

If more than one, please specify the percentage to go to each individual.

You can also specify ages at which you may want your children to receive benefits.

If you would like to specifically exclude individuals, please include details here.

Signature of Policyholder

Full Name of Policyholder

Date

Once you have signed and dated the document you should send a copy to your Trustees and keep the original with your Life Policy Trust.

Please also send a copy to us so that we can keep a record of your wishes with your policy records.

**By post**  
Beagle Street  
16-17 West Street  
Brighton  
BN1 2RL

**By email**  
[trusts@beaglestreet.com](mailto:trusts@beaglestreet.com)