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## **Absolute Trust Deed Zurich Intermediary**

*Legal amp General Advisers and Wealth Managers. Home British Insurance Brokers Association. Discretionary Trust. Utmost Limited Online Log On. Life Insurance Literature Advisers Vitality. Trusts Public. Aegon UK Access or register for online services. Family Office Stonehage Fleming Stonehage Fleming. Institutional Capabilities State Street Global Advisors. Contacts amp Customer Enquiries ? Phoenix Life Limited. Lending Criteria Tesco Bank for Mortgage Intermediaries. Investment Bond Assignment Articles Financial Advice. Personal Protection Flexible trust. Change your*

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name Nationwide. Royal London Life Insurance Pensions and Investments. BNY Mellon The Investments Company for the World. The Structure of the Australian Financial System. Ageas Insurance Car Home Business Motorcycle Van. Generic trust amp assignment documents Public. Scottish Provident Literature. www openwork zurich co uk. An Investment Services Platform For Advisers FundsNetwork. Manage my policy Peterborough ? Phoenix Life Limited. Swiss bank account Offshore Specialists. Putting your life insurance into trust Manage my life. Product literature Document library Aviva for Advisers. Trusts Literature Advisers AIG Life. ZURICH ASSURANCE LTD AND SCOTTISH WIDOWS LIMITED SCHEME. At Your Service Underwriting Service amp Support. Trusts For Advisers Scottish Widows. Home Wellington Management. Cofunds has been upgraded. UBS Absolute Return Callable Units. Trusts Legal amp General. Trust life assurance to do the right thing. For

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*employers Declaration of trust for a Relevant Life policy. Establishing a business in Switzerland Practical Law. Buy to Let policy the Coventry for intermediaries. PIMCO Investment Management Home PIMCO. CAPITAL CHOICE Lending criteria More 2 Life. Document library UK Intermediary Zurich Insurance. Legal amp General Videos and webinars. Absolute Trust Deed Zurich Intermediary. Investment Bond. Aviva For Advisers Login to secure services. MAXIMUM Lending criteria. Canada Life UK. Private client law in Switzerland overview Practical Law. Business in Switzerland AmCham Switzerland. Home Capital Trustees*

**Legal amp General Advisers and Wealth Managers**

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December 25th, 2019 - This website is designed to give professional financial advisers information and tools that they can use to help control and develop their business and should not be relied upon by private investors or any other persons'

**'Home British Insurance Brokers Association**

*December 26th, 2019 - The British Insurance Brokers Association is the UK s leading general insurance intermediary organisation Find Insurance 0370 950 1790 Search online now Insurance Guides Read our guides here Latest News member updates media and publications Join BIBA Today Sign up here Latest News'*

**'Discretionary Trust**

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December 23rd, 2019 - Trustees shall hold the income and capital of the Trust Fund upon trust for the benefit of one or more of the Potential Beneficiaries at any time during the Trust Period in the shares and upon the terms as the Trustees shall in their absolute discretion appoint All appointments shall be by deed and may be stated to be revocable or irrevocable' *'Utmost Limited Online Log On*

*December 21st, 2019 - Utmost Limited which provides insurance bonds and Utmost Trustee Solutions Limited where it has been appointed as a trustee in connection with an insurance bond provided by Utmost Limited The registered address of each company listed in section 17 a to b is Royalty House Walpole Avenue Douglas Isle of Man IM1 2SL'*

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'Life Insurance Literature Advisers Vitality

December 22nd, 2019 - Life's better with more Vitality This year along with a number of exciting new benefits and products we are further enhancing the Vitality Programme' 'Trusts Public

December 26th, 2019 - Trusts In this section you will find all of our trust literature Use the links on the left to browse through specific trust literature or see below for our recently updated trust material New or r?' 'Aegon UK Access or register for online services

December 26th, 2019 - Login or register for Aegon s secure online services We use cookies to give you the best experience we can If you continue we ll assume you re happy to receive all cookies from the website'

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**'Family Office Stonehage Fleming Stonehage Fleming**

December 21st, 2019 - Stonehage Fleming is a leading independently owned Family Office in London there were similar concerns over the introduction by the US of the Qualified Intermediary Regime QI in 2001 but it was business as usual who can negotiate a course which will be accepted by all parties in line with the requirements of the trust deed'

**'Institutional Capabilities State Street Global Advisors**

*December 25th, 2019 - You are leaving SSGA com The website you are accessing is created and maintained by another entity We make no representation or warranty with respect to the information contained on the site or that it is appropriate in*

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*all jurisdictions or countries or for use by all investors or counterparties'*

**'Contacts amp Customer Enquiries ? Phoenix Life Limited**

*December 21st, 2019 - The administrator can claim the proceeds of any life and some pension policies owned by the deceased person which are not in trust or subject to an assignment In Scotland the administrator is called the ? executor dative ? and the grant of representation is called the ? confirmation ?'*

**Lending Criteria Tesco Bank for Mortgage Intermediaries**

*December 19th, 2019 - Freehold absolute ownership Scotland and leasehold tenures on residential property suitable for*



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owner occupation are accepted Freehold flats are not allowed unless the applicant owns the freehold of the whole building subject to leases of any other flats in the building'

**'Investment Bond Assignment Articles Financial Advice**

December 25th, 2019 - The change of ownership should be supported by a proper legal document ? a deed of assignment When you assign an investment bond the person you have assigned it to becomes the beneficial owner as if they had owned the bond from day one i e the start date of the investment'

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**'Personal Protection Flexible trust**

December 25th, 2019 - Flexible trust Including Split trust ? retained and gifted benefits Survivorship option ? for joint life first death policies Choice of governing law For customers Personal Protection This draft trust has been drawn up based on our understanding of current law and HM Revenue amp Customs practice'

**'Change your name Nationwide**

December 21st, 2019 - Take proof of your name change into one of our branches and a member of our staff will update your details You'll find a list of valid proof of name change on this page and you'll need to take in the original or

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certified copy of the document not a photocopy' '**Royal London Life Insurance Pensions and Investments**  
December 24th, 2019 - From Life Insurance Pensions and Investments Royal London has been helping people plan for life's  
financial milestones since 1861 We help our members save for the future purchase life insurance protection and invest  
with confidence and clarity Find out more today'

'**BNY Mellon The Investments Company for the World**

December 26th, 2019 - BNY Mellon is a global investments company dedicated to helping its clients manage and service  
their financial assets throughout the investment lifecycle' '**The Structure of the Australian Financial System**

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December 22nd, 2019 - The Australian financial system has undergone significant change over the two decades since the Campbell Inquiry triggered a period of financial deregulation Not only have there been marked changes in the relative importance of the different institutions operating in the financial system but the nature of financial intermediation itself has evolved along with the deepening of financial markets'

**'Ageas Insurance Car Home Business Motorcycle Van**

December 26th, 2019 - One of the UK s largest car insurers around five million customers already trust us to protect their cars homes travel and business Trustpilot rated listening to our customers feedback Make a claim 24 7 our

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customers can make a claim at any time day or night' '**Generic trust amp assignment documents Public**

December 21st, 2019 - Generic trust amp assignment documents By continuing to use this site you consent to the use of cookies on your device as described in our cookie policy unless you have disabled them You can change your cookie settings at any time but parts of our site will not function correctly without them'

'**Scottish Provident Literature**

December 21st, 2019 - Scottish Provident is one of the leading providers of life critical illness income protection and unemployment cover Recognised by the industry with many awards Scottish Provident has a wealth of experience and expertise and a flexible product range to suit everyone'

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**'www openwork zurich co uk**

*December 17th, 2019 - We would like to show you a description here but the site won?t allow us'*

**'An Investment Services Platform For Advisers FundsNetwork**

December 25th, 2019 - FundsNetwork is one of the UK s leading investment services platforms See how we offer financial advisers flexibility from a broad range of solutions'

**'Manage my policy Peterborough ? Phoenix Life Limited**

December 23rd, 2019 - If you make any mistakes whilst completing the deed but before it is finally signed please do not

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use correction fluid but sign your initials next to the changes or complete a new deed Please send the completed deed and supporting documentation to Phoenix Life Lynch Wood Park Lynch Wood Peterborough PE2 6FY'

'Swiss bank account Offshore Specialists

December 22nd, 2019 - Trust ? please provide a certified copy of the declaration of trust or deed of settlement as appropriate and for any of the trust?s settlor beneficiary s with a vested interest and for all other authorised account signatories please provide certified copies of the items laid out at i through iv below'

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**'Putting your life insurance into trust Manage my life**

December 23rd, 2019 - Normally placing a policy in trust is an irrevocable act which means once the policy is in trust this decision can't be changed later on so you need to really think if putting your policy in trust is right for you You can put a life insurance policy into trust as soon as it starts or at a later date Who's needed to set up a trust'

**'Product literature Document library Aviva for Advisers**

December 21st, 2019 - Library In our library you'll find a variety of literature to help both you and your client learn more about our products and services We've got all the product literature you'd expect to find plus a number of



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documents to support you'

'Trusts Literature Advisers AIG Life

June 12th, 2017 - You will only need to complete a paper trust form if you decide the cover needs to be written into a business trust after it has been activated AIG will not need to see the trust deed before the plan goes on risk but you must confirm whether a trust deed has been completed We will only need to see the original trust deed when a claim is made'

'ZURICH ASSURANCE LTD AND SCOTTISH WIDOWS LIMITED SCHEME

December 7th, 2019 - a the Zurich Group Personal Pension No 1Z Plan established by a trust deed and rules dated 21

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August 2003 and governed as at the date of this Scheme by a supplemental trust deed and rules dated 1 March 2013 as amended from time to time and b the Zurich Personal Pension No 2E Plan established by a trust deed and rules dated

**27' 'At Your Service Underwriting Service amp Support**

*December 2nd, 2019 - Zurich Intermediary Group For intermediary use only not for use with your clients may at our absolute discretion grant or withhold or grant subject to conditions including conditions as to our responsibility Flexible Business Trust Deed'*

**'Trusts For Advisers Scottish Widows**

**December 24th, 2019 - Scottish Widows offer a wide range of trusts to help your clients have protection policies that**

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**can be tax efficient as well as making sure any proceeds are paid quickly and to the right people' 'Home Wellington Management**

*December 25th, 2019 - About Wellington Management International Limited and the Umbrella Funds Wellington Management International Limited is authorised and regulated by the Financial Conduct Authority of the United Kingdom and is entered on the register maintained by the Financial Conduct Authority and the Prudential Regulation Authority Reference number 208573'*

**'Cofunds has been upgraded**

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December 22nd, 2019 - We re currently experiencing a temporary problem with Unipass so you ll need to log in using your Cofunds user ID and password If you ve forgotten your Cofunds user ID and password please phone us on 0345 604 4001' 'UBS Absolute Return Callable Units

November 17th, 2019 - UBS Absolute Return Callable Units Series 13R AUD and Series 13R I am we are acting in accordance with my our designated powers and authority under the trust deed In the case of superannuation funds if applicable pursuant to an intermediary authorisation for the purposes of section 911A 2 b of the Corporations Act'

'Trusts Legal amp General

December 21st, 2019 - Setting up a Trust is quick and easy Once you know the type of Trust you need you can enter all

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your details online so the deeds are ready to be printed signed and sent to us If you prefer you can choose to print out a blank form to complete later' 'Trust life assurance to do the right thing

June 11th, 2019 - Yes you can write an existing policy into trust and most life offices will have the right trust deed for you to do so Although this is technically a chargeable lifetime transfer for IHT purposes the value of your policy is likely to be nil so there shouldn't be any tax implications'

**'For employers Declaration of trust for a Relevant Life policy**

*December 23rd, 2019 - important you fully understand the terms of the trust and how it works You ll find more*

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*information in the Key features of the Relevant Life policy If you use this draft you're deemed to have accepted responsibility for it This draft trust deed and the accompanying notes are based on our understanding of the law and HM Revenue amp Customs'*

**'Establishing a business in Switzerland Practical Law**

December 16th, 2019 - Establishing a business in Switzerland by Roland Truffer Susanne Schreiber Thomas Stoltz and Laura Widmer Bär amp Karrer Related Content A Q amp A guide to establishing a business in Switzerland This Q amp A gives an overview of the key issues in establishing a business in Switzerland including an introduction to the legal system the'

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**'Buy to Let policy the Coventry for intermediaries**

*December 25th, 2019 - Freehold also known as Feuhold heritable or absolute ownership tenure is acceptable for houses bungalows and cottages in England Wales and Scotland Freehold If you re not a UK mortgage intermediary or professional advisor and would like information about a mortgage please go to thecoventry co uk'*

**'PIMCO Investment Management Home PIMCO**

**December 26th, 2019 - Pacific Investment Management Company LLC ?PIMCO? is an investment adviser registered with the U S Securities and Exchange Commission ?SEC? PIMCO Investments LLC ?PIMCO Investments? is a broker dealer registered with the SEC and member of the Financial Industry Regulatory Authority Inc ?FINRA?'**

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**'CAPITAL CHOICE Lending criteria More 2 Life**

December 15th, 2019 - relying on the evidence from the intermediary We may ask for copies of the evidence in Scotland a Protected Trust Deed which upon completion ? Absolute ownership Scotland Property types Properties of standard construction are acceptable' **'Document library UK Intermediary Zurich Insurance**

**December 21st, 2019 - This website is for financial advisers within the UK Customers looking for Zurich products please go to Zurich.co.uk Unless you are a financial adviser in the UK who has entered into separate contractual arrangements with Zurich Intermediary Group Limited ?ZIG? for access to the secure parts of this website the viewing of this web**

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**'Legal amp General Videos and webinars**

*December 25th, 2019 - Legal amp General reserves the right in its absolute discretion at any time and without notice to update remove amend or vary any of the content which appears on any page of this Site However please note that any of the content on our Site may be out of date at any given time and we are under no obligation to update it'*

**'Absolute Trust Deed Zurich Intermediary**

**November 28th, 2019 - notes and the draft trust neither Zurich Assurance Ltd nor any of its officers employees or agents**

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accept responsibility for the operation of the trust which should be referred to your own legal advisers to ensure it meets your requirements Absolute Trust Deed'

'Investment Bond

December 24th, 2019 - trust deed or a certified copy where non?Standard Life trust documentation Please provide us with your relevant Global Intermediary Identification Number GIIN if you are a financial institution GIIN Please provide percentage share of the trust for each trust beneficiary if known e g for Absolute Trusts' '*Aviva For Advisers Login to secure services*

*December 24th, 2019 - Before you start you ll need to have registered and received your Aviva for Advisers online*

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*account number registered for and collected your Unipass digital certificate'*

'MAXIMUM Lending criteria

December 20th, 2019 - or in Scotland a Protected Trust Deed which upon completion won't be satisfied ? Have a judgement registered at the property address which is not linked to an individual s ? Have more than 3 unsatisfied CCJ?s individually or jointly ? In Scotland are the subject of an undisclosed inhibition'

'Canada Life UK

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December 24th, 2019 - Canada Life International Assurance Ireland DAC is authorised and regulated by the Central Bank of Ireland Stonehaven UK Limited and MGM Advantage Life Limited trading as Canada Life are subsidiaries of The Canada Life Group U K Limited Stonehaven UK Ltd is authorised and regulated by the Financial Conduct Authority'

'Private client law in Switzerland overview Practical Law

December 15th, 2019 - The lump sum tax regime is available at the federal tax level and in most cantons except Zurich Basel City are imposed where one of the parties in the transaction or an intermediary or broker qualifies as a Swiss securities dealer for stamp duty If the trust deed is silent on jurisdiction or the jurisdiction clause in the trust'

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**'Business in Switzerland AmCham Switzerland**

*December 22nd, 2019 - Instead of incorporating a company in Switzerland a business can be operated through a branch of a foreign company Further it should be noted that the legal form of a trust as known in common law does not exist in Swiss civil law'* **'Home Capital Trustees**

December 24th, 2019 - Capital Trustees is a full member unique in Ticino of the Swiss Association of Trust Companies SATC the association that brings together trust companies that professionally perform trustee services in Switzerland and that enjoy great prestige and excellent reputation''

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