



Request for conditional assignment

To be completed by the policy owner(s) when conditionally assigning their policy to a bank or a financial institution as protection against a liability. The conditional assignee has the right to receive some or all of the benefits payable under the policy terms and conditions; however the policy owner retains ownership.

Policy number

Full name of policy owner 1

Full name of policy owner 2

I/We hereby appoint the following bank/financial institution as the conditional assignee of my/our policy.

Details of assignee

Full name

Branch

Assignee e-mail
(if available)

Correspondence address

P O Box	City	Country
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Reason for assignment

Assignment Amount

Currency	Amount
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Rights of a conditional assignee:

- Any existing regular withdrawals (including any fund advisor fees; income payments or school fees) will continue under the original authority of the policy owner;
- It is the responsibility of the assignee to be aware of any existing regular payments, based on information supplied by Zurich;
- Such payments will only be cancelled on instruction from the policy owner; however
- All future requests from the policy owner to make withdrawals; loans or other payments must be ratified in advance by the assignee;
- If the assignee wishes to place any restrictions on future payments or switches, this must be agreed in conjunction with the policy owner;
- No instruction to make future payments or switches will be accepted from the assignee acting alone; unless such actions are allowed for in the deed of assignment or in any other agreement;
- All relevant correspondence relating to the policy will be copied to the assignee;
- The policy owner may not now assign the policy to any other party without the written agreement of the assignee being forwarded to Zurich

Signature of policy owner 1

Signature of policy owner 2

Date signed

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