



Policyholder Instruction Form

Starting a new Excepted Group Life policy following trust expiry

Following the expiry of your previous Excepted Group Life trust, you now have a replacement trust in place. This also requires replacement policies to be issued.

This form instructs us as AIG Life Limited to terminate the policy(ies) from your previous trust and set up new ones under the new one. The effective date of the new policies will be the same as the trust’s start date.

By completing and returning this form, you (as the principal employer under both the previous and new trusts and the policyholder) are instructing AIG Life Limited to terminate the policy(ies) detailed below and set up replacement policy(ies) for the purpose stated above.

Policy code	Policy name - e.g. Excepted Group Life Insurance

Name of new trust	
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(This should be the same as the previous trust, with 'No. 2' added)

Effective date of new trust			
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Section A - new policy details

Policyholder’s name	
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Section B - Data protection statement

AIG Life Limited is the data controller in its capacity as insurer and holds and processes all personal data in accordance with the Data Protection Act 2018 (DPA).

The information supplied by you, including special categories of data, as defined by the DPA, may be used by AIG Life Limited for administration, customer service, reporting and fraud prevention or to meet legal or regulatory requirements. It may also be shared with your adviser, other companies in our Group, insurers, reinsurers, service providers and other third parties who may carry out work on AIG Life Limited’s behalf. The information supplied by you may be transferred outside the UK including to countries outside the European Economic Area (including the USA, Malaysia, and Philippines). Further details can be found in our privacy notice which can be found at www.aiglife.co.uk/privacy-policy.

Section C – Declaration and signatures

First authorised signature

Name			
Signature			
Capacity			
E-mail address			
Date			

Second authorised signature

Name			
Signature			
Capacity			
E-mail address			
Date			

Please scan the form and email it to groupquotes@aiglife.co.uk along with the new completed Excepted Group Life Trust document.



www.aiglife.co.uk

AIG Life Limited. Registered in England and Wales. Number 6367921. Registered address: The AIG Building, 58 Fenchurch Street, London EC3M 4AB.

AIG Life Limited is authorised by the Prudential Regulation Authority and regulated by the Financial Conduct Authority and the Prudential Regulation Authority. The registration number is 473752.

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