

# How to complete the Excepted Group Life trust document

The following fields in the trust document need to be completed:

Page number	Field	What to enter	Comments
Covering page	Insertcompanyname	The policyholder's registered company name	
1	Today'sdate	Date the document is being completed / the deed is executed	This is the date the deed is executed, not the start, or effective, date of the trust
1	Insertcompanyname	The policyholder's registered company name	
1	Regnumber	The policyholder's Companies House registration number	If the policyholder is a charity, insert the charity number.
1	Registeredaddress	The policyholder's registered company address	
1	Insertcompanyname	The policyholder's registered company name	
1	Startdateofpolicy	The on-risk date	If you don't know the date they want to go on-risk please enter another date (providing it is before the on-risk date). This has to be today's date or a date in the future (the trust start date cannot be backdated)
2	Name	The company name of each of the participating employers	The policyholder should be included on this list
2	Registered Number	The Companies House registration number for each of the participating employers	
2	Registered Address	The registered address for each of the participating employers	

### Signatories - Page 3

- The policyholder (sponsor) must sign in the Sponsor section
- There must be two signatories
- The sponsor only signs this section – they do not sign as a participating employer
- Each participating employer must sign in the Original Participating Employers section. There must be two signatories for each participating employer
- If there is more than the sponsor and one other participating employer this page will need to be printed and signed by each of the other participating employers (the sponsor only needs to sign once).

### Appendix 1 – Notice of participation - Page 17

- This page should not be completed when the trust is being set up
- It should be used if a new participating employer joins the trust after the trust has been set up
- It should be completed as follows:
  - Insertcompanyname – name of the sponsor (policyholder)
  - Newparticipatingemployer – name of the new employer joining the trust
  - Companynumber – registered Companies House number of the new employer joining the trust (if it is a charity we need the charity's number)
  - Newparticipatingemployer – name of the new employer joining the trust
  - Signature on behalf of new employer – authorised signature of new employer joining the trust
  - Signature on behalf of sponsor employer – authorised signature of the policyholder of the trust
  - Both signatures must be dated
- A copy of the completed notice of participation **must** be sent to us.

### Appendix 2 – Notice of termination of participation - Page 18

- This page should not be completed when the trust is being set up
- It is to be used if a participating employer in the trust leaves the trust (after the trust has been set up)
- It is to be completed as follows:
  - Insertcompanyname – name of the sponsor (policyholder)
  - Participatingemployer – name of the participating employer leaving the trust
  - Companynumber – registered company number of the employer leaving the trust
  - Participatingemployer – name of the participating employer leaving the trust
  - Signature on behalf of the participating employer – authorised signature of employer leaving the trust
  - The signature must be dated
- A copy of the completed notice of termination of participation **must** be sent to us.

### Other things (on page 3) to be aware of

- The signatures must be 'wet' signatures i.e. signed in ink
- You must email us a copy of the executed trust deed and keep the original of the deed for your records.

