



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 Aviva Protection UK 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 Aviva Protection UK 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

Section B - Data protection statement

Aviva Protection UK 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 Aviva Protection UK 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 Aviva Protection UK Limited's behalf. Sometimes we, or third parties acting on our behalf, may need to transfer personal information to parties located in other countries (including the USA, Philippines and India) that have data protection regimes that are different to those in the country where you're based, including countries which haven't been found to provide adequate protection for personal information by the UK Government. When making these transfers, we will take steps to ensure that your personal information is adequately protected and transferred in accordance with the requirements of data protection law. Further details can be found in our privacy notice which can be found at protection.aviva.com/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 groupcoveramendments@aiglife.co.uk along with the new completed Excepted Group Life Trust document.

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Registered address: Aviva, Wellington Row, York, England, YO90 1WR. Aviva Protection UK Limited is
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protection.aviva.com

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