Set up and manage a scheme

Specimen documents for your client's group life assurance scheme

We provide specimen trusts and rules that your client can use to set up their own group life assurance scheme. We also provide specimen deeds to help your client keep these trust rules up to date.

Read on to find out about our specimen documents in more detail.

Your client should talk to their legal adviser before signing a document to make sure their needs are met. Our specimen documents are in an editable format.

Choose from the frequently downloaded documents below. Call or email us if you can't find the document you need.

Your client's own scheme for employees

Set up a registered scheme

- Declaration of Trusts and Rules - Staff of a Company
- Declaration of Trusts and Rules - Staff of a Company (notes)
- Declaration of Trusts and Rules - Staff of a Company named trustees
- Declaration of Trusts and Rules - Staff of a Company named trustees (notes)
- Declaration of Trusts and Rules - Staff of a LLP
- Declaration of Trusts and Rules - Staff of a LLP (notes)
- Declaration of Trusts and Rules - Staff of a Partnership
- Declaration of Trusts and Rules - Staff of a Partnership (notes)

Set up an excepted group life policy scheme

- EGLP declaration of trust and rules – staff of a company
- EGLP declaration of trust and rules – staff of a company named trustees
- EGLP declaration of trust and rules – staff of a LLP
- EGLP declaration of trust and rules – staff of a partnership

Add a participating employer

- Deed of Adherence (Including a Company in a scheme set up by a LLP)
- Deed of Adherence (Including a Company in a scheme set up by a Partnership)
- Deed of Adherence (Including a Company in a scheme set up by another Company)
- Deed of Adherence (Including a LLP in a scheme set up by another LLP)
- Deed of Adherence (Including a Partnership in a scheme set up by another Partnership)

Change the principal employer

- Deed of Amendment (Company replaces LLP as Principal Employer)
- Deed of Amendment (Company replaces Partnership as Principal Employer)
- Deed of Amendment (LLP replaces Company as Principal Employer)
- Deed of Amendment (LLP replaces Partnership as Principal Employer)
- Deed of Amendment (New Company replaces Old Company as Principal Employer)
- Deed of Amendment (New Company replaces Old Company as Principal Employer, Old Company still included)
- Deed of Amendment (New LLP replaces Old LLP as Principal Employer)
- Deed of Amendment (New Partnership replaces Old Partnership as Principal Employer)
- Deed of Amendment (Partnership replaces Company as Principal Employer)
- Deed of Amendment (Partnership replaces LLP as Principal Employer)

Change the scheme name

- Supplemental Deed of Amendment (Company)
- Supplemental Deed of Amendment (LLP)
- Supplemental Deed of Amendment (Partnership)

Assign your policy to cover the benefits of different scheme

- Deed of Assignment (Company to Company)
- Deed of Assignment (Company to Trustees)
- Deed of Assignment (Trustees to Company)
- Deed of Assignment (Trustees to Trustees)

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Replacing scheme rules

- Rules (for use with a separate declaration of trust) - Registered scheme named trustees
- Rules (for use with a separate declaration of trust) - Registered scheme staff of a Company, Partnership or LLP
- EGLP rules - for use with a separate declaration of trust - corporate trustee
- EGLP rules - for use with a separate declaration of trust - named trustees

Partners' life assurance trust

Set up an excepted group life policy scheme

- Declaration of Trust for Equity Partners – EGLP Covering Equity Partners (Indefinite)
- Declaration of Trust for LLP Members – EGLP Covering LLP Members (Indefinite)

Set up a non registered scheme for Partner business protection

- Declaration of Trust for Equity Partners and LLP Members - business protection (equity partners)
- Declaration of Trust for Equity Partners and LLP Members - business protection (LLP members)

Group Life and Relevant Life Mastertrusts

To join or replace the principal employer

- Group Life Mastertrust application form
- Relevant Life Mastertrust application form

Tell us about scheme changes

Remember to keep the policy up-to-date and tell us about scheme changes

Use our Group protection change of policyholder form to tell us if: the principal employer changes; the trustees change; the policy is assigned to a different scheme; or you want to join or leave either of our Mastertrusts.

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04/26 BH1987