

Adding discretionary beneficiaries

Your Bright Grey Trust includes a list of Discretionary Beneficiaries. These are individuals your Trustees can appoint Gifted Benefits to. If you want to add other people to this list, please complete this form and give it to your Trustees. You do not need to send this form back to Bright Grey.

Your Trust Details (“the Trust”)

Declaration of Trust signed

Settlor 1

Settlor 2

The following is written as if one person is the plan owner. If there are two plan owners, please read ‘I’ as ‘we’ and ‘me’ as ‘us’.

I refer to the Trust in your favour as Trustees, relating to the above numbered Bright Grey plan. I hereby notify you that I wish to add the beneficiaries set out below to the list of Discretionary Beneficiaries set out in the Trust.

Settlor 1

Settlor 2

Please list the full name of each new Discretionary Beneficiary.

New Discretionary Beneficiary