



## Discretionary loan trust Draft legacy of loan entitlement

If you need any help, please call your Customer Support Team or our general enquiry number 03455 212 414.

### Using this form

The following form of words, if included in a will or a codicil to an existing will, enables the lender to pass on their loan entitlement on death (e.g. to a spouse or civil partner) so they can continue receiving the part repayment of the loan.

This should be discussed with the lender's solicitor, who is responsible for drawing up any new will or the codicil which gives effect to the amendment to the lender's will.

### Wording for possible inclusion in a will or codicil to a will

I give to my [*Name of recipient e.g. husband, wife, child etc.*] my entitlement under the loan made on the [*date of the loan agreement*] to the trustees of the trust created by me by a deed of trust dated [*date of loan trust*] together with all rights and benefits arising thereunder including the right to call in the loan or postpone the calling in thereof as they think fit.



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