

Trust as Beneficiary Nomination Sample

Term Life Insurance Policy

This form serves as a sample of nominating a trust as the beneficiary under a term life insurance policy.

Please ensure all information is accurate and up-to-date before submitting to your insurance provider.

Policyholder Name:

Policy Number:

Beneficiary Nomination Details:

Name of Trust:

Trust Date:

Name of Trustee(s):

Trust Identification Number (if any):

Share Percentage:

_____ % (e.g., 100%)

Relationship to Insured:

Sample Beneficiary Designation Wording:

"The [Name of Trust], dated [Trust Date], and any amendments thereto,
Trustee(s): [Name(s) of Trustee(s)], as the beneficiary of 100% of all policy proceeds."

Policyholder Signature

Date:

____ / ____ / ____