

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:**

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