

LOAN TRUST

REQUEST FOR LOAN REPAYMENT

Phoenix Wealth, Unit Linked Life & Pensions, PO Box 1393, Peterborough, PE2 2TP.

What is this form for?

This form can be used with the Bare Loan Trust or the Discretionary Loan Trust.

It should be used by the Lender to request repayment of the Loan (or part of it) to the Trustees. Please list all the Trustees, including the Lender if they are still a Trustee.

If your Investment Bond policy is in Trust, Trust Registration Service evidence will be required, if not already provided to us, before any claims can be paid.

To the following Trustees:

In accordance with the terms of the Loan Agreement dated / /
entered into with you the Trustees of the Trust created by me by a Deed dated / /

I hereby request repayment of £ of the Loan currently outstanding.

I acknowledge that the amount of the Loan remaining outstanding after the above repayment will be

£ held on the terms of the Loan Agreement referred to above.

Lender's Signature:

Date:

Phoenix Life Limited, trading as Phoenix Wealth, is authorised by the Prudential Regulation Authority and regulated by the Financial Conduct Authority and the Prudential Regulation Authority. Phoenix Life Limited is registered in England No. 1016269 and has its registered office at: 1 Wythall Green Way, Wythall, Birmingham, B47 6WG.

PH_LBT0005 | May 2023