



Assignment Checklist

Please use this checklist of requirements to assist Windsor Life in processing the assignment of your policy. To avoid unnecessary delays please make sure that you enclose:

- The Original Deed of Assignment
- Identification of the Assignee (the individual to whom the policy is being assigned)

If the assignment is to an individual, we additionally require:

- One identification item from the following Primary list, plus one item from the Secondary list

Primary ID

- Original/Certified* Passport (current version only) or
- Original/Certified* Drivers Licence (full current version, **not** provisional) or
- Current Benefit Book/Statement or
- HM Revenue & Customs Coding letter

Secondary ID

- Utility bill (within last 3 months) e.g. gas, phone (please note that mobile phone bills are not accepted).
- Council Tax bill or payment book (for current year only)
- Bank or Building society statement (within the last 3 months)

*Certified copies may be provided. Copies must be marked as "original seen" and signed and dated by the certifier. Suitable certifiers are:

- UK Lawyer
- Banker
- Authorised Financial Intermediary
- Accountant

Please also note the following:

- Use of correction fluid will invalidate forms
- For security reasons we would be grateful if you would send us original documents where requested, which will be returned to you on the day of receipt by recorded delivery. We do not accept certified copies because of the potential there is for photocopy documents to assist in the perpetration of fraud. Even authorised photocopies do little to prevent forgery, as inherent security features such as watermarks are still absent.