

**Property Protective Trust (PPT)**



<b>Surname(s)</b>		<b>First Name(s)</b>	
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**PPT Information:**

- Please affix this supplementary form to the instruction and tick the appropriate box on front page.
- The PPT covers simple situations only, for complex planning please request a quotation.
- The PPT requires at least two Trustees, if necessary, nominate additional Trustees.
- The PPT can be used to give 'life interest' to an individual following the Testator's death, the individual receiving life interest is known as the 'Life Tenant'. The PPT ensures the Life Tenant has a place to live.
- The PPT can give the Life Tenant the flexibility to downsize or move property should they wish to.
- Placing some or all of a property in the PPT can protect it from potential creditors or spendthrift beneficiaries.

<b>Is Property Subject to PPT the Testator's Home Address?</b> (please circle)	<b>Yes</b>	<b>No</b>
<b>If Not, Provide Address of Property Subject to the PPT</b>		

<b>Is Life Tenant the Surviving Spouse / Partner?</b> (please circle)	<b>Yes</b>	<b>No</b>
<b>If Not, Please Complete</b>	<b>Name</b>	
	<b>Relationship to Testator(s)</b>	
	<b>Full Address</b>	

<b>What Event Will Mark the End of the Trust Period?</b> (please circle or complete)	<b>Death</b>	<b>Marriage / Civil Partnership</b>	<b>Period of Months:</b> _____ Months
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<b>How is the Property Owned?</b> (please circle)	<b>Single Name</b>	<b>Joint Tenants</b>	<b>Tenants-in-Common</b>
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<b>Is ToE Required? If YES, Complete ToE Instruction Form</b> (please circle)	<b>Yes</b>	<b>No</b>
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<b>Are the PPT Beneficiaries the Same as the Residuary Estate?</b> (please circle)	<b>Yes</b>	<b>No</b>
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**If the PPT Beneficiaries are Different, Please Enter Beneficiaries' Details Below:**

Full Name(s)	Relationship to Testator	Share %
		___%
		___%
		___%
		___%
		___%

Are the 2 <sup>nd</sup> Testator's Beneficiaries the Same as the 1 <sup>st</sup> Testator's? (please circle)	Yes	No
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If the 2<sup>nd</sup> Testator's Beneficiaries are Different, Please Enter Beneficiaries' Details Below:

Full Name(s)	Relationship to Testator	Share %
		___%
		___%
		___%
		___%
		___%

Trustees Same as Executors? (please circle)	Yes	No (complete below)
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Trustees:

Full Name			Telephone	
Relationship to T1		Relationship to T2		
Full Address				

Full Name			Telephone	
Relationship to T1		Relationship to T2		
Full Address				

Full Name			Telephone	
Relationship to T1		Relationship to T2		
Full Address				

Full Name			Telephone	
Relationship to T1		Relationship to T2		
Full Address				