



## Verification of Trust Form

### **GENERAL INFORMATION**

Name of Insured:

Name of Trust Agreement:

Date of Trust Agreement:

Trust Tax ID Number:

Name of Trustee(s):

Street Address

City:

State:

Zip:

Policy/Contract Number(s):

The undersigned Trustee(s) and Settlor(s) hereby certify that:

- A valid Trust has been established; and
- The undersigned Trustee(s) has/have the authority, under applicable law, to purchase said life insurance policy on his/their sole signature(s).

The undersigned Trustee(s) and Settlor(s) hereby acknowledge that Liberty Life Assurance Company of Boston (Liberty Life) shall be entitled to recognize the undersigned Trustee(s) as having the right to exercise any and all ownership rights provided by the terms of the policy/contract identified above, including but not limited to, the right to collect dividends, cash surrender value, change the beneficiary, and obtain loans without the consent of the Owner(s) or Settlor(s).

The undersigned Trustee(s) and Settlor(s) hereby agree that Liberty Life shall not be responsible for inquiring into the terms of the Trust Agreement, shall not be charged with knowledge of its provisions, and may assume that the Trust Agreement is in effect unless written notice to the contrary is filed at Liberty Life's Home Office. Further, Liberty Life may rely solely on the signature of the Trustee(s) for the exercise of any rights of the Owner and payment to the Trustee(s) of the proceeds of said policy/contract shall fully discharge Liberty Life from all liability under said policy/contract to the extent of such payment.

Neither Liberty Life, nor any of its agents, employees or representatives has provided any legal or tax advice of any kind to the undersigned. The undersigned rely solely on the tax and legal advice of independent tax and legal advisors in regard to any of the tax and legal issues related to the Trust and the creation thereof and the purchase of said policy/contract.

### **SIGNATURES**

Signature of Settlor/Grantor	Date (mm/dd/yyyy)
Signature of Settlor/Grantor	Date (mm/dd/yyyy)
Signature of Trustee	Date (mm/dd/yyyy)
Signature of Trustee	Date (mm/dd/yyyy)
Signature of Trustee	Date (mm/dd/yyyy)
Witness Signature	Date (mm/dd/yyyy)