



**Verification of Trust**

Name of Insured(s): \_\_\_\_\_  
\_\_\_\_\_  
Name of Trust Indenture: \_\_\_\_\_  
Date of Trust Indenture: \_\_\_\_\_  
Policy No(s): \_\_\_\_\_

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

- a. A valid Trust has been established;
- b. The undersigned Trustee(s) has/have the authority, under applicable law, to purchase said life insurance policy on his/their sole signature(s); and
- c. The Trustee(s), on his/their sole signature, may exercise any and all ownership rights, subject to the provisions of the policy, including but not limited to the right to collect dividends, cash surrender value, change the beneficiary, and obtain loans on the policy without the consent of the Insured(s) or Settlor(s).

The undersigned Trustee(s) and Settlor(s) agree that Sun Life Insurance and Annuity Company of New York shall not be responsible for the application or disposition of the proceeds of said policy by the Trustee(s), and payment to the Trustee(s) of the proceeds of said policy shall fully discharge Sun Life Insurance and Annuity Company of New York from all liability under said policy to the extent of such payment. Also, by signing this statement, both Settlor(s) and Trustee(s) verify that all information contained herein is true and complete and that Sun Life Insurance and Annuity Company of New York is entitled to rely on this verification for all purposes relating to the said policy.

Neither Sun Life Insurance and Annuity Company of New York, 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.

The singular used herein shall include the plural whenever applicable.

\_\_\_\_\_  
Dated at \_\_\_\_\_ this \_\_\_\_\_ day of \_\_\_\_\_, 200\_\_.

\_\_\_\_\_  
Signature of Settlor/Grantor

\_\_\_\_\_  
Signature of Trustee

\_\_\_\_\_  
Signature of Settlor/Grantor

\_\_\_\_\_  
Print name of Trustee

\_\_\_\_\_  
Signature of Trustee

\_\_\_\_\_  
Print name of Trustee