

Please complete as appropriate

Adviser's agency number:



Priority application form

Over 50s Life Insurance Plans

Applying is easy

Applying for one of our Over 50s Life Insurance Plans couldn't be easier.

By post

1. Check that your personal details are correct and fill in any missing information.
2. Tick the relevant box on your application form to indicate your chosen plan(s) and monthly premium(s). Please ensure your total choice of monthly premium does not exceed £50.
3. Complete the direct debit section in section 4.
4. Once you are happy all information is correct, please sign the form. Post back to us at Legal & General, PO Box 1001, Cardiff CF24 0EB

1. Your details

The information below is required to process your application form. Please ensure that all fields below are completed and correct.

Title:

Surname (in full):

Forename(s):

Address:

Postcode:

Date of birth:

/ /

Please complete these:

Have you used any tobacco products in the last 12 months (including nicotine replacement therapy)? (please tick) Yes No
Your answer to this question will not affect your premium

Gender (please tick): Male Female

Home telephone number:
(Including STD code)

Email address:

2. Your choice of plan(s) and monthly premium(s)

Please confirm the plan(s) you wish to take out, and the monthly premium(s) you wish to pay by ticking or writing in the other box for each plan. Please also confirm the benefit amount in the box provided for each plan below.

To find out the amount of benefit available for each premium shown below, please see the Rate Table PDF on this website. Premiums are also available in £1 increments, to find out about all of these please call us.

You can take out more than one plan as long as a total of all your premiums added together are not more than £50 a month.

<input type="checkbox"/> Fixed Plan	Benefit amount	£			
£5 <input type="checkbox"/>	£10 <input type="checkbox"/>	£15 <input type="checkbox"/>	£20 <input type="checkbox"/>	£25 <input type="checkbox"/>	£30 <input type="checkbox"/>
£35 <input type="checkbox"/>	£40 <input type="checkbox"/>	£45 <input type="checkbox"/>	£50 <input type="checkbox"/>	other <input type="text"/>	

<input type="checkbox"/> Increasing Plan	Benefit amount	£			
£5 <input type="checkbox"/>	£10 <input type="checkbox"/>	£15 <input type="checkbox"/>	£20 <input type="checkbox"/>	£25 <input type="checkbox"/>	£30 <input type="checkbox"/>
£35 <input type="checkbox"/>	£40 <input type="checkbox"/>	£45 <input type="checkbox"/>	£50 <input type="checkbox"/>	other <input type="text"/>	

<input type="checkbox"/> Funeral Plan	Benefit amount	£2,250
If you have selected a Funeral Plan, please refer to the enclosed 'Premium tables' to find your monthly premium.		
Please make sure you tick the box in section 3 below.		
Monthly premium	<input type="text"/>	(please complete)

3. Funeral Plan Charge

I agree to Dignity Pre Arrangement Ltd ("Dignity") providing funeral services in accordance with the Dignity Funeral Plan (the "Funeral Plan") up to the value of the proceeds of my Legal & General Over 50s Life Insurance Plan ("my Plan"). I charge my Plan to Dignity. I agree to the proceeds of my Plan being paid directly to Dignity.

I understand that I am only able to charge my Plan to Dignity where there are no other charges, assignments or trust arrangements affecting it.

I also understand that I (or my personal representatives following my death) may cancel this charge at any time before Dignity has been instructed to provide the funeral services whereon Dignity will release this charge and notify Legal & General of the release.

I agree and accept that Dignity will only be obliged to provide the funeral services as detailed in the Funeral Plan where (and to the extent) it can rely on this charge over my Plan.

I agree that Legal & General can pass on my personal information to Dignity and its related group of companies for the purpose of processing and administering my funeral services which may be paid for through my Plan.

Please confirm that you wish to charge your Plan on the conditions outlined above.

- I confirm that I agree to Dignity providing funeral services as outlined above, that I charge my Plan to Dignity, that there are no other charges, assignments or trust arrangements affecting my Plan and that I would like the proceeds of my Plan to be paid to Dignity on my death and that Dignity may process my personal data for the purposes of administering the charge and my funeral services.

Please complete sections 4 and 5 on reverse

All the information you need to complete your instruction can be found in your cheque book or on your bank statement



4. Instruction to your bank or building society to pay by direct debits

Please ensure that the person paying the premiums (if not yourself) completes the direct debit validation section below right. Please fill in the white areas and send this together with the application form to: Legal & General, PO Box 1001, Cardiff CF24 0EB.

1. Name and full postal address of your bank or building society

To: The manager of	Bank or building society
Address	
Postcode	

2. Name(s) of account holder(s)

3. Branch sort code

 - -

Originator's identification number

 5 1 1 1 4 8

4. Bank or building society account no.

For completion by Legal & General

5. Instruction to your bank or building society

Please pay Legal & General direct debits from the account detailed in this instruction subject to the safeguards assured by the Direct Debit Guarantee (found on your letter). I understand that this Instruction may remain with Legal & General and, if so, details will be passed electronically to my bank or building society.

X

Signature

X

Date

Direct Debit guarantee

- This guarantee is offered by all banks and building societies that take part in the direct debit scheme.
- If an error is made in the payment of your direct debit either by us, Legal & General, or by your bank or building society, you are entitled to a full and immediate refund from your bank branch. Simply contact your bank or building society to arrange a refund. Or, if you prefer, contact Legal & General, and they will arrange to repay you direct.
- You can cancel a direct debit at any time simply by contacting your bank, building society, or us. Written confirmation may be required.
- If there are any changes to the amount, date or frequency of your direct debit, Legal & General will notify you in advance of your account being debited. This will be five working days or as otherwise agreed.
- If you request us to collect a payment, confirmation of the amount and date will be given to you at the time of the request.

A copy of the direct debit guarantee can be found on the back of the Policy Summary PDF. Please keep this safe for future reference.

Direct Debit validation

Only fill in this section if the payments are not being made from the applicant's account.

Payer home address:

Postcode:

Relation to plan applicant(s):

Declaration by payer:

I understand that although I am making premium payments, I do not hold an automatic claim on the plan proceeds.

X

Signature

X

Date

5. Declaration and consent

Please read the following and sign below

Disclosures: We will disclose your information to other companies within the Legal & General group of companies, regulatory bodies, law enforcement agencies, future owners of our business, suppliers we engage to process data on our behalf and when necessary, to a reinsurer.

If you make a claim, we will share your information (when necessary) with other insurance companies to prevent fraudulent claims.

Please read the information above and on the reverse before signing the declaration

Use of your information:

We take your privacy very seriously. We use the personal information collected via this form and any other information that you provide to us ('your information') for the purposes of:

1. providing you with our products and services and dealing with your enquiries and requests;
2. administering your policy including processing claims;
3. carrying out market research, statistical analysis and customer profiling; and
4. sending you marketing information (by post, telephone, email and SMS) about products and services of companies in the Legal & General group and of third parties whose products and services we offer to our customers.

By submitting this form you are agreeing to receive the information as described in 4 above, unless you tell us otherwise by ticking this box . Given the global nature of our business, we may need to transfer your information to countries outside the European Economic Area in order to provide our services to you.

Verification of identity:

To protect you and us from financial crime, we may need to confirm your identity from time to time. We may need to do this by using reference agencies to search sources of information about you (an identity search). This will not affect your credit rating. If this identity search fails, we may ask you for documents to confirm your identity.

Fraud prevention:

We will check your details with fraud prevention agencies. If false or inaccurate information is provided and fraud is identified details will be passed to fraud prevention agencies. Law enforcement agencies may

access and use this information.

We and other organisations may also use this information to prevent fraud and money laundering, for example, when:

- checking details on applications for credit and credit related or other facilities;
- managing credit and credit raised accounts or facilities;
- recovering debt;
- checking details and proposals and claims for all types of insurance;
- checking details of job applicants and employees; and
- we and other organisations may access and use from other countries the information recorded by fraud prevention agencies.

Access:

Please contact us at: Group Financial Crime, Legal & General House, Kingswood, Tadworth, Surrey, KT20 6EU if you want to receive details of the relevant fraud prevention agencies.

You have the right to ask for a copy of your information in return for payment of a small fee. To obtain a copy of your information, please write to us at Legal & General Assurance Society, 1st Floor, Knox Court, 10 Fitzalan Place, Cardiff, CF24 0TL.

I can confirm:

- that I am a UK resident, and that I reside in the UK for at least 183 days a year;
- that the information I have provided is accurate; and
- that I have seen and read the Policy Summary.

Please sign below

X

Signature

X

Date

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