

Lifetime Mortgage

Letter of Authority Form to consent to adviser access
or consent to appoint a new adviser.

Important information

Instructions for completing this form

1. Please complete:

- Part A – your details
- Part B – your Adviser details, which must include their FCA number

2. Then either:

- Part C – if you want to consent to Adviser access (see details in part C) this must include your signature(s)
Or
- Part D – if you want to appoint a new Adviser and / or firm (see details in part D) this must include the signature of their compliance officer / company director along with your signature(s)

3. Once you've completed this form, please return it to Legal & General Home Finance

- By email to: customerservices@landghomefinance.com. Please put your Account Number in the subject line.
- Or, by post to: Legal & General Home Finance, PO Box 17225, Solihull, B91 9US

When we receive your form we'll process it and only contact you if we have any queries.

A. Customer details

Account number(s)

Full name(s)

Customer 1

Customer 2

Address

Postcode

Phone number

Email address



B. Adviser details

Full name	<input type="text"/>
Company name	<input type="text"/>
FCA reference number	<input type="text"/>
Principal Firm FCA reference number (if applicable)	<input type="text"/>
Company address (as registered with Legal & General Home Finance)	<input type="text"/>
Postcode	<input type="text"/>
Phone number	<input type="text"/>
Email address	<input type="text"/>

C. Consent to adviser access

This gives your consent for an adviser to access details about your lifetime mortgage.

When your adviser has been authorised, we will give them information about your lifetime mortgage and, where appropriate, provide them with other information about your dealings with us to enable them to give you informed advice.

Your consent is valid for a **maximum of 12 months** from the date you sign this form after which you will need to complete a new consent form. If you'd prefer consent to end before 12 months, please enter the expiry date below.

Ongoing authority until (DD/MM/YYYY)

<input type="text"/>	<input type="text"/>	/	<input type="text"/>	<input type="text"/>	/	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
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Customer signature(s)

Signature 1

Date of signature (DD/MM/YYYY)

<input type="text"/>	<input type="text"/>	/	<input type="text"/>	<input type="text"/>	/	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
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Signature 2

Date of signature (DD/MM/YYYY)

<input type="text"/>	<input type="text"/>	/	<input type="text"/>	<input type="text"/>	/	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
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D. Consent to appoint a new adviser

- This gives your consent to appoint a new adviser for your L&G lifetime mortgage. When your Adviser has been appointed, we will share details about your lifetime mortgage and, where appropriate, provide them with other information about your dealings with us to enable them to give you informed advice.
- We will also transfer future servicing rights on your account, and any future Drawdown commission will be paid to the named Adviser and firm. Servicing rights give an advice firm the ability to advise you on your lifetime mortgage. By transferring servicing rights, you are changing from your original advice firm to the firm that you indicate on this form.
- This authority will remain in place until you cancel it.

Customer signature(s)

Signature 1

Date of signature (DD/MM/YYYY)

 / /

Signature 2

Date of signature (DD/MM/YYYY)

 / /

Compliance Officer/Company Director signature

Signature

Date of signature (DD/MM/YYYY)

 / /

Print name

For appointed representatives, please ensure that the compliance officer / company director signature is that of the principal firm.

By signing this document, the above-named firm assumes all servicing rights on the account, and takes responsibility for all future Drawdown advice.

For further information

Visit legalandgeneral.com

Or call us on **03330 048 444**.

Lines are open 8.30am – 5.30pm, Monday to Friday.

Call charges will vary. We may monitor and record calls.

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