Simplified financial information

Important information

Please remember that if you do not answer the following questions fully and accurately, it may mean that a claim may not be paid and your policy may be amended or cancelled.

Where examples are shown, they are not intended to be a complete list.

Full name:

Date of birth (DD/MM/YYYY):

Reference:

1. Do you have, or are you applying for any other life, critical illness or income protection cover with L&G or any other insurance company? This includes any cover provided by your employer e.g. death in service arrangements.

Yes ☐ No ☐

If 'Yes', please give details below and indicate all those policies or applications which are to be cancelled or replaced by this application.

This must include details of any L&G policies or applications.

	Policy/Application 1	Policy/Application 2	Policy/Application 3
Company, e.g. L&G:			
Commencement date:			
Policy type and duration:			
Amount of cover:			
Reason for cover:			
Will this cover remain in force/be going ahead?	Yes ☐ No ☐	Yes ☐ No ☐	Yes ☐ No ☐

Please continue on an additional sheet if necessary.

2. What was your gross earned income in the last tax year?

£

If your earned income is below £10,000 pa, please give details of all other household earned income in the last year.

£

Please note: Do NOT include any unearned income such as investment income.
For self-employed persons, please give net taxable earnings as assessed for income tax after deduction of allowable business expenses.

3. What is the total value of your net assets?

£

'Net assets' are your total assets (for example house, car, shares, share of business), less your total liabilities (for example mortgage, outstanding debt). Where examples are shown, they are not intended to be a complete list.

4. For business loan and key person cover – please provide details of the net profit (before tax) for your business for the last complete business year.

£

5. Have you been investigated, arrested, charged, convicted or do you have a prosecution pending for any of the following? Bribery, Corruption, Counterfeiting, Embezzlement, Fraud, Money laundering, Tax evasion.

Please ignore any conviction that is spent under the Rehabilitation of Offenders Act.

Please tick only one answer.

Investigated	☐	Arrested	☐	Charged	☐
Convicted	☐	Prosecution pending	☐	No	☐

If you have been investigated, arrested or charged, please give details:

Declaration

I declare that, to the best of my knowledge and belief, all the statements made by me are true and complete. I acknowledge that L&G will use the information I give to determine whether to offer me a policy and to assess how much premium I must pay. This information will form part of the legal relationship between us and if any of it is incorrect, I may lose my right to make a claim under the policy and my policy may be amended or cancelled.

I agree to inform L&G in writing of any change to the above answers between the date of the application and the issue of the policy contract.

Full name:

Signature:

Date (DD/MM/YYYY): ☐☐ ☐☐ ☐☐☐☐

Alternative formats

If you would like a copy of this in large print, braille, PDF or in an audio format, call us on **0370 010 4080**. We may record and monitor calls. Call charges will vary.

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