

Simplified financial information

i Important information

Please remember that if you do not answer the following questions fully and accurately it will very likely mean that a claim will be declined and the policy cancelled.

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

Full Name

Date of Birth (DDMMYYYY)

Reference

Full Name							
□	□	□	□	□	□	□	□
Reference							

1. Do you have, or are you applying for any other life, critical illness or income protection cover with another insurance company or Legal & General? 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 Legal & General policies or applications.

Company e.g. Legal & General

Commencement date

Policy type and duration

Amount of cover

Reason for cover

Will this cover remain in force/be going ahead?

Policy/Application 1	Policy/Application 2	Policy/Application 3
<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>
Yes <input type="checkbox"/> No <input type="checkbox"/>	Yes <input type="checkbox"/> No <input type="checkbox"/>	Yes <input type="checkbox"/> No <input type="checkbox"/>

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.

Investigated Arrested Charged
 Convicted Prosecution pending No

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

Please ignore any conviction that is spent under the Rehabilitation of Offenders Act.
Please tick only one answer.

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 Legal & General 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.

I agree to inform Legal & General 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 (DDMMYYYY)

Contact us

 legalandgeneral.com

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