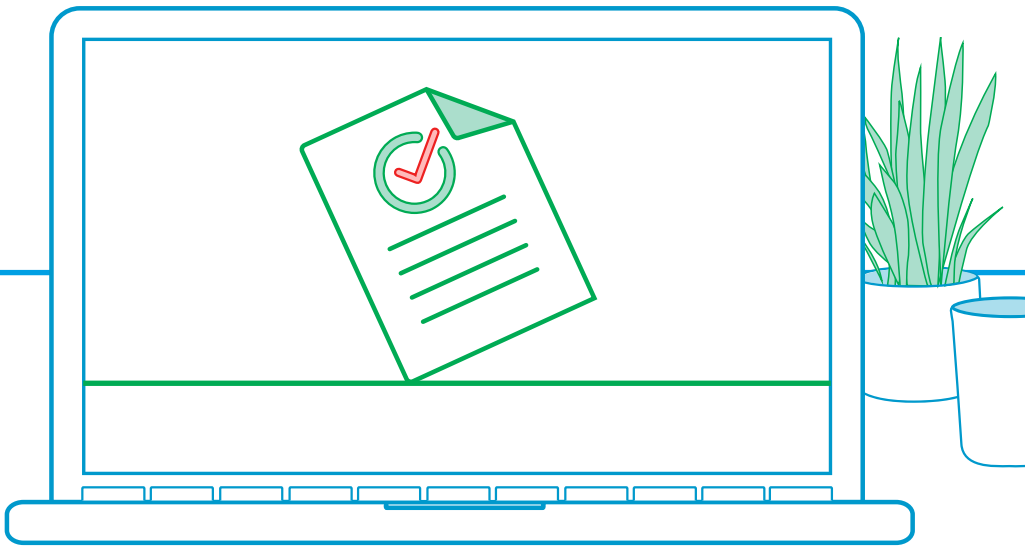


# Put your trust in us

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A guide to our new  
Online Trusts



For Adviser use only

  
**Legal &  
General**

# Online Trusts in a few easy steps

We believe putting a policy in trust is a good thing for your clients. That's why we've made it easier for you to set up a trust for your clients with our new online trusts.

When completing a new application in our online application platform 'Online Protection Connect' (OLPC), we've added a few simple extra steps that will set up a trust from the outset.

## WHAT YOU DO

1

### Choose to complete a trust

After the Underwriting section, choose to complete a trust.

2

### Enter your clients details

Your clients will automatically be a trustee, fill in the name and address of at least one additional trustee and where applicable add the beneficiary's name.

3

### Update the Application

'Update' the application, enter the start date. **The trust is now live.**

## WHY CHOOSE ONLINE TRUSTS?

- **It's easy** - Complete the process online in just a few extra steps.
- **No more signatures or witnesses** - Trusts are in place from the outset, so no more delays in getting paperwork completed. This makes the process easier for you and your clients.
- **Enhanced features for split trusts** - Your clients now have more choice on how much terminal or critical illness benefit to retain and how much to put in trust.
- **Greater freedom** - We've made changes to our trusts that allow your clients to exercise product options without the trustee's permission such as declining their indexation option.

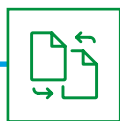
## THE FOLLOWING TRUSTS ARE AVAILABLE ONLINE

- Flexible Trust or Discretionary Trust - Single Life Personal Protection
- Survivor's Trust - Joint Life Personal Protection
- Relevant Life Plan Trust - Relevant Life Plans
- Business Trust - Single Life Business Protection



**ONCE THE TRUST IS LIVE YOU DON'T NEED TO DO ANYTHING ELSE. WE DO THE REST.**

## WHAT WE DO



### **We take it from here**

We update our records to show the policy is in trust.



### **Advisers can access the trust online**

You will be able to find the trust in the Documents section of Agent Hub in OLPC.



### **Your clients can review their trust online**

Available for your clients in My Account.

For more information on online trusts, or to view our FAQs please visit:  
[www.legalandgeneral.com/trusts](http://www.legalandgeneral.com/trusts)



**For more information about our Online Trusts, please visit:  
[legalandgeneral.com/trusts](https://legalandgeneral.com/trusts)**

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