

APPLICATION FORM (RLP14)

Welcome to Legal & General.

This form contains parts for both the employer and employee to fill out and sign. Please answer all questions in this form to the best of your knowledge and belief, as this will help avoid any delay in processing the application. If you don't answer fully and accurately, it will very likely mean that a claim may not be paid and the policy amended or cancelled.

See the following pages for some brief notes that will help you with your application. Thank you.

Adviser Declaration – For Adviser use only

Full name of firm	
Principal FCA Firm Reg. No.	Appointed Representative FCA Firm Reg. No. (if applicable)
FCA Individual Reg. No.	Legal & General Agency No.
Name of Representative	Signature
Email address	Your reference
Date (DDMMYYYY) <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>	

Please remind your client of the importance of answering questions fully and accurately.

Legal & General do not require you to provide proof of identification for clients or 3rd party payers, as we will complete our own checks. All intermediaries should maintain processes to prevent them from being used to further financial crime, and Legal & General's requirements do not prevent them from collecting client verification for their own purposes.

Basis of Advice Declaration

To meet our regulatory reporting requirements, Legal & General must record whether advice was given to your client(s) regarding this sale. Please select the relevant answer below.

Was advice given? Yes No

Copy policy documents to adviser required Yes No



PART D. SIGNATURES

IN WITNESS whereof the parties have signed this instrument as a deed

To create the Trust an authorised signatory of the Principal Employer needs to sign here.

Witnessing:
Please ensure that all signatures are witnessed by an independent person.

The same person can witness all signatures.

Witnesses must be adult and not someone already named in the Trust nor their spouse or registered civil partner.

Date: Once all the parties have signed, please insert the date of the deed in the box on page 3.

		Principal Employer	
1. Signed and delivered as a deed by the said (full name of Principal Employer)			
2. Full name of authorised signatory			
3. Authorised signatory capacity			
4. Signature			
5. In the presence of witness (full name of witness)			
6. Signature of witness			
7. Address of witness			
8. Date (DD/MM/YY)			
		Additional Trustee 1	Additional Trustee 2
1. Signed and delivered as a deed by the said Trustee (full name)			
2. Signature			
3. In the presence of witness (full name of witness)			
4. Signature of witness			
5. Address of witness			
6. Date (DD/MM/YY)			
		Additional Trustee 3	Additional Trustee 4
1. Signed and delivered as a deed by the said Trustee (full name)			
2. Signature			
3. In the presence of witness (full name of witness)			
4. Signature of witness			
5. Address of witness			
6. Date (DD/MM/YY)			

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.

Legal & General Assurance Society Limited

Registered in England and Wales No. 00166055.

Registered office: One Coleman Street, London EC2R 5AA

We are authorised by the Prudential Regulation Authority and regulated by the Financial Conduct Authority and the Prudential Regulation Authority.

W13547 06/2022



RELEVANT LIFE PLAN NOMINATION FORM

TO BE COMPLETED BY THE LIFE ASSURED



IMPORTANT NOTES – before completing the Nomination Form, please read the following notes.

1. This document has been produced as a guide for consideration for you and your legal advisers.
2. Under this Nomination Form you tell the Trustees of your Trust who you wish to receive any lump sum death benefits under the Policy. This Form is a guide to the Trustees and it will not be legally binding on the Trustees.
3. You should be aware that Beneficiaries may have a right to see this Form, but this will depend on the particular circumstances. The Form should not be signed before the Trust Deed has been completed.
4. If you wish to change or revoke a previous nomination you have made, then you can use this form and you should tell the Trustee(s) in the Additional Information section.
5. Legal & General has drafted this Nomination Form to reflect the law as at 1 January 2022. Legal & General and its advisers cannot accept any responsibility for loss, damage or other claim that may arise from the use of this Form or the way in which you complete it. We therefore strongly recommend that you consult your own legal adviser before proceeding.
6. Use CAPITALS and black or blue ink throughout. If you make a mistake while completing the Nomination Form, please correct the error by crossing out (do not use correction fluid) and initial by the change.

NOMINATION FORM TO THE TRUSTEES OF THE RELEVANT LIFE PLAN TRUST

i The Life Assured should read Important Notes on page 1 before completing the Nomination Form.

To the Trustee(s) of the Relevant Life Plan Trust policy number

The 'Policy'

In the event of my death, I wish any lump sum benefits payable under the Policy to be paid to:

Name	Name
Address	Address
Postcode	Postcode
Relationship	Relationship
Percentage %	Percentage %

Name	Name
Address	Address
Postcode	Postcode
Relationship	Relationship
Percentage %	Percentage %
Total Percentage	100%

Additional information which may be relevant to the Trustee(s)

This form supersedes any earlier nomination form I may have completed for this Policy.

I understand that this form is in no way binding on the Trustee(s) of the Policy, and that the final decision as to who the death benefits are payable to will be made by the Trustee(s).

I can change or revoke this nomination at any time.

Signature Print Name

Date

i Please note that this form should be sent to the Trustees and retained by the Trustees and is for their consideration only. Legal & General do not need to see a copy.

Alternative formats

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legalandgeneral.com

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