

# Registered Group Life Mastertrust Application form

## What is the Legal & General Group Life Mastertrust?

It's a registered master trust scheme we've set up, that's available to employers insuring Group Life Assurance with us.

Our Group Life Mastertrust is not suitable for employers insuring:

- Employees who do not have a UK employment contract. For example, employees of subsidiaries and associated companies based outside the UK.
- Employees with Enhanced Protection or Fixed Protection from the tax charge above the Lifetime Allowance.
- Dependants' Pension benefits.
- Excepted Group Life Policy or Relevant Life Policy benefits. Employers choosing to insure Excepted Group Life Policy or Protect Relevant Life Policy benefits with us may wish to consider our Relevant Life Mastertrust instead, which they can join using our [Relevant Life Mastertrust application](#).

Read [Introducing the Legal & General's Mastertrusts](#) for more details about our Relevant Life Mastertrust and our registered Group Life Mastertrust.

You can apply to join our registered Group Life Mastertrust by simply completing this form, signing and e-mailing this back to us. We will confirm inclusion in writing once we've received your application and agreed your policy cover.



### Important

Please remember we'll need the completed registered Group Life Mastertrust application form before your policy start date or the date you wish to assign the insured benefits to our Mastertrust.

If you're completing this form before the policy starts, you can leave the 'Policy number' entry in section 1 blank. We'll insert it for you.

## 1. Principal employer

Registered address if a company; principal business address if a partnership.

Name

Address

  

Postcode

Companies House registration number

Policy number

## 2. Declaration by the grantee of the policy

In order to participate in the Mastertrust, we agree to:

- comply with all of the provisions in the Group Life Mastertrust's Definitive Deed and Rules that apply to participating employers, as well as the terms of this policy;
- assign the benefit of this policy to the Group Life Mastertrust's trustees for so long as we continue to participate in this master trust;
- make sure that any subsidiary or associated employers whose employees are at any time insured for benefits under the policy also comply with the Group Life Mastertrust's Definitive Deed and Rules;
- act on behalf of any subsidiary or associated employers for the purposes of any matter under the Definitive Deed and Rules which requires:
  - agreement between the trustees and an employer;
  - the giving of notice by the trustees to an employer;
  - notification by the trustees to an employer; or
  - consultation by the trustees with an employer

We also confirm that:

- any action that we take, or taken by any subsidiary or associated employer, which falls within the definition of discrimination under the Equality Act 2010, or a breach of the terms and conditions of employment, rests with the principal employer or its subsidiary or associated employer as appropriate; and
- the responsibility of the Mastertrust trustees is restricted to benefits that arise from time to time.

We wish to participate in the Group Life Mastertrust with effect from (e.g. 01/04/2021)

The effective date is the earliest date from which you want to join our Group Life Mastertrust.

When you complete the date, please remember the earliest time we can include an employer under our Group Life Mastertrust is once all the following has happened:

- we've received this completed form;
- we've reached the effective date shown on this form; and
- the Legal & General Group Life Assurance policy is in force.

We'll show the inclusion date in our confirmation of inclusion.

Signature for policyholder

X

Name in BLOCK CAPITALS

# Contact us



**0345 072 0751**

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



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Q0060490 03/21