

Relevant Life Mastertrust Application form

What is the Legal & General Relevant Life Mastertrust?

It's a master trust scheme we've set up, that's available to employers insuring Group Life Assurance with us as either an Excepted Group Life Policy or a series of Protect Relevant Life Policies.

Our Relevant Life Mastertrust is not suitable for:

- Employers insuring the employees who do not have a UK employment contract. For example, employees of subsidiaries and associated companies based outside the UK.
- Dependants' Pension benefits.
- Registered scheme benefits. Employers choosing to insure their registered Group Life Assurance benefits with us may wish to consider our registered Group Life Mastertrust instead, which they can join using our [registered Group 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 Relevant 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 Relevant Life Mastertrust application form before your policy start date, or the date you wish to transfer the benefits of your scheme to our Mastertrust.

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

While you participate in our Relevant Life Mastertrust, you may set up additional Excepted Group Life Policies for a different benefit basis, or a new Protect Relevant Life Policy for a new employee. Unless you tell us otherwise, we'll automatically include these policies under the Relevant Life Mastertrust without needing a further application form.

1. Principal employer

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

Name

Address

Postcode

Companies House registration number

Policy numbers or wrap 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 Relevant Life Mastertrust's Definitive Deed and Rules that apply to participating employers, as well as the terms of the policies;
- assign the benefit of:
 - any policy shown in this application; and
 - any policy set up under a wrap number shown in this application; and
 - unless agreed in writing otherwise, any other Group Protection Excepted Group Life Policy or Protect Relevant Life Policy issued to us by Legal & General Assurance Society Limited

to the Relevant Life Mastertrust's trustees for so long as we continue to participate in the Relevant Life Mastertrust;

- make sure that any subsidiary or associated employers whose employees are at any time insured for benefits under the policy also comply with the Relevant 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 Relevant Life Mastertrust with effect from (e.g. 01/04/2021)

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

When you complete the date, please remember the earliest time we can include an employer under our Relevant 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 first Legal & General Excepted Group Life Policy or Protect Relevant Life 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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