Additional trustee form

Please use this form either in conjunction with our **onboarding form, change of policyholder form** or on its own to let us know the details of any trustees that need to be added or removed from our records. This form is only to update L&G and should reflect the details or changes made to the trust deed. Please take legal advice to assist with any queries over updating your trust. Please use as many copies of this form as you need to let us know about all trustees of the scheme. Please note you only need to give details of individuals or corporate trustees if they are named in the trust document or a later addendum. If the corporate trustee is the same as the principal employer, you do not need to complete this form. If the principal employer has changed, please update us using the change of policyholder form. Once complete, please send to the address at the bottom of this form.

To protect you and us from financial crime, we may need to confirm your identity. We may do this by using reference agencies to search sources of information about you (an identity search). This will not affect your credit rating. If this identity search fails, we may ask you for documents to confirm your identity.

Protecting your personal information is extremely important to L&G. This policy tells you how we collect and process personal information. Please share this with the named individual trustees you're providing information about. https://www.legalandgeneral.com/privacy-policy/

Scheme name	
Principal employer name	
Policy number(s)	
	Trustee details to be: ☐ added ☐ removed
Trustee full name (including any middle names; for corporate trustees, please provide the registered company name)	
Company registration number (if applicable)	
Date of birth	
Gender	
Address (this is the home address for individual trustees or the registered company address for a corporate trustee)	
Postcode	

Trustee details to be: ☐ added ☐ removed

Trustee full name
(including any middle names; for corporate trustees, please provide the registered company name)

Company registration number (if applicable)

Date of birth

Gender

Address
(this is the home address for individual trustees or the registered company address for a corporate trustee)

Postcode

Trustee details to be: ☐ added ☐ removed

Trustee full name
(including any middle names; for corporate trustees, please provide the registered company name)

Company registration number (if applicable)

Date of birth

Gender

Address
(this is the home address for individual trustees or the registered company address for a corporate trustee)

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(including any middle names; for corporate trustees, please provide the registered company name)

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Gender

Address
(this is the home address for individual trustees or the registered company address for a corporate trustee)

Postcode

Contact us

0345 026 0094
We may record and monitor calls. Call charges will vary.

group.protection@landg.com
legalandgeneral.com/employer/group-protection/

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Authorised by the Prudential Regulation Authority and regulated by the Financial Conduct Authority and the Prudential Regulation Authority.

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