

Voluntary Life Assurance Plan spouse/ partner's death claim notification

Please make sure you complete all fields on this form. If vital information is missing we'll return the form and won't be able to make any payments.

Please complete in **BLOCK CAPITALS**.

Policyholder's name

1. About the employee

Employee's surname

Employee's forename(s)

Date of birth
(DD/MM/YYYY)

When did the employee join
the company?
(DD/MM/YYYY)

Employee's occupation

Location of employer where
member was last employed

2. About the spouse/partner

Surname

Forename(s)

Deceased's address

Postcode

Date of birth
(DD/MM/YYYY)

Date of death
(DD/MM/YYYY)

Marital status at
date of death

Cause of death as shown
on death certificate

National Insurance number

3. About the scheme

Scheme details

Group policy number
Date the deceased became a member of the scheme (DD/MM/YYYY)
Membership category at date of death
Entry date into the category (DD/MM/YYYY)

Life Assurance Benefit

4. Documents enclosed



Please send original certificates issued by a Registrar, for example birth and death certificates. These are protected by Crown copyright and cannot be lawfully copied without the consent of HMSO.

Please send us an original certificate confirming the death if:

- The member died outside the UK.
- You're sending us this form within 10 working days of the death being registered.
- Only a Coroner's interim certificate has been issued.

For most other circumstances we're able to confirm deaths without seeing the original death certificate. If we cannot, we'll ask you for the original certificate and explain why it's needed.

To help you, we've included the checklist below to make sure you've included all the documents we need:

Original death certificate (if required)

Copy of last completed application form

5. Life Assurance Benefit claimed

The benefit being claimed must be in accordance with the contract(s) of insurance. You'll need to make sure the deceased was eligible for cover and, the benefit claimed is calculated in accordance with the terms agreed for insurance purposes. If this is the first claim under the policy or the Trustee bank details have changed, please provide the bank details on the policyholder's headed paper.

Amount claimed

£

Basis of calculation

Trustee's bank account number

Trustee's bank sort code

Trustee's bank account name

Trustees of

Benefit Direct to Beneficiaries

Would you like to pay the benefit directly to the beneficiaries? Yes No

If you ticked 'yes' please complete the **'Pay Direct to Beneficiaries Instruction'** form.

6. Fraud prevention

The personal information Legal & General collects from you and/or your employer will be shared with fraud prevention agencies who will use it to prevent fraud and money laundering and to verify your identity.

If false or inaccurate information is provided and fraud is identified, details will be passed to fraud prevention agencies. Law enforcement agencies may access and use this information. We may also share information about you with other organisations and public bodies, including the police and we may check and/or file your details with fraud prevention agencies and databases.

If fraud is detected, you could be refused certain services, finance or employment. Further details of how your information will be used by us and these fraud prevention agencies can be found by accessing this link, www.cifas.org.uk/fpn

Legal & General and other organisations may also access and use this information to prevent fraud and money laundering, for example, when:

- Checking details on applications for credit and credit related or other facilities.
- Managing credit and credit related accounts or facilities.

- Recovering debt.
- Checking details on proposals and claims for all types of insurance.
- Checking details of job applicants and employees.
- Checking sources of income and tax details.

Legal & General and other organisations may access and use from other countries the information recorded by fraud prevention agencies.

Please contact our Group Financial Crime department if you wish to receive the relevant details of the fraud prevention agencies:

Group Protection, Legal & General Assurance Society Limited, Four Central Square, Cardiff, CF10 1FS

Legal & General may also check the details of other parties related to your contract, including verification of identity. This includes beneficiaries, trustees, settlors, third party premium payers, executors or administrators of your estate, parties with power of attorney and any other beneficial owner.

7. Declaration and undertaking by policyholder



Protecting personal information is extremely important to Legal & General. Our Privacy Policy tells you how we collect and process personal information. Please take a few minutes to read it. legalandgeneral.com/privacy-policy/ Please contact us if you'd like us to post you a copy of the Privacy Policy.

The benefit claimed should be payable in accordance with the contract(s) of insurance.

I have checked to make sure the deceased was eligible for cover and any earnings-related benefits are calculated using the Scheme Earnings we agreed for insurance purposes.

Name

Signature

Date (DD/MM/YYYY)

Capacity in which signing
(e.g. Trustees, Scheme
Administrator)

Contact us



0345 026 0094

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



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legalandgeneral.com/adviser/workplace-benefits/group-protection/



**Group Protection, Legal & General Assurance Society Limited,
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Legal & General Assurance Society Limited

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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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