

# Onboarding Details

This Onboarding form replaces any Proposal form requirement. Please refer to the reference notes on page 2 to assist with completion. This form can be completed by your intermediary on your behalf. If a Flex policy we will require some additional details.

1) Accepted quote reference	
2) Premium frequency	
3) Policy start date	
4) Annual renewal date	

Changing the quoted premium frequency or annual renewal date may affect the quote. Read sections 2 and 4 on page 2 for further detail.

<b>5) Assumptions and other changes</b>	<b>Are the quote assumptions correct?</b> Yes      No		
	If you selected No, please contact your Legal & General Sales Account Manager before completing this form.		
<b>6) Principal employer</b>	<b>Business name</b>		
	<b>Registered address</b> (Principal address if not registered with Companies House)		
	<b>Employer contact name</b>	<b>Employer email</b>	
	<b>Companies House number</b> (if registered)	<b>Alternative registration details</b> (If not registered with Companies House, please give alternative registration details. For example, registration with a professional body or the Charity Commission.)	
<b>7) Participating employers</b> Use this space to confirm the name, registered address and Companies House number of any participating employers. Please give name and principal address of a business not registered with Companies House.	<a href="#">Click here to add more Participating employers</a>		
<b>8) Previous medical underwriting</b> Please use the drop-down to confirm how details will be provided if necessary, refer to section 8 on page 2 for guidance.			
<b>9) Membership data</b>			
<b>10) Intermediary contact</b> If placing direct please provide details of the day to day administration contact at your company.	<b>Firm name</b>		
	<b>Name</b>		
	<b>Email</b>		
	<b>Number</b>		
<b>11) Payment details (optional)</b> We don't need account details for refunds if premiums are paid by Direct Debit. We also don't need account details for claim payments if you're setting up Group Life Assurance to pay through our Mastertrust or a Critical Illness Cover policy. Read section 11 on page 2 for more guidance.	<b>Premium refunds</b> (if not paid by Direct Debit)		<b>Claim payments</b> (if different)
	<b>Account name</b>		<b>Account name</b>
	<b>Account number</b>		<b>Account number</b>
	<b>Sort code</b>		<b>Sort code</b>

## Information only needed for death in service policies:

<b>12) Absentees (including those on reduced hours/duties)</b> Section 12 on page 2 explains the absences you must tell us about. If you don't tell us about an absence we may not pay a claim. Contact your Legal & General Sales Account Manager if the absentee details have changed.			
	<a href="#">Legal &amp; General Group Life Mastertrust (Registered)</a>		<a href="#">Other (please provide details of other mastertrusts in the employer scheme details below)</a>
<b>13) Mastertrust</b> Select all that apply. Please refer to section 13 on page 2 for details of the additional forms to complete when using our Mastertrust.	<a href="#">Legal &amp; General Relevant Life Mastertrust (EGLP)</a>		
<b>14) Employer scheme details</b> If the employer is not using our Mastertrust, please provide further details here. Please refer to section 14 on page 2 for more guidance. <a href="#">To add Additional Notes click here</a>		<b>Registered</b>	<b>EGLP</b>
	<b>Scheme name</b>		
	<b>PSTR for Registered Date EGLP trust executed</b>		
<b>Trustees</b> (Mandatory)	Principal employer	Principal employer	Principal employer
	Other trustees (I'll supply details using the <a href="#">Additional trustee form</a> )	Other trustees (I'll supply details using the <a href="#">Additional trustee form</a> )	Other trustees (I'll supply details using the <a href="#">Additional trustee form</a> )

Please return a signed [Register of authorised signatures](#) to let us know if you want to authorise additional individuals to give us instructions in relation to death in service policy(ies) for this employer.



# Onboarding Reference

Please use this section to help you complete the form on page 1.

All references to employers includes LLP/partnerships and covering equity partners and LLP members.

## 1. Accepted quote reference

The new policy will match the cover and terms described in this quote.

## 2. Premium frequency

Premiums can be paid yearly, quarterly or monthly. Yearly premiums are approximately 2% lower than the total of 4 quarterly premiums or 12 monthly premiums

- Yearly premiums are paid by [BACS](#)
- Quarterly or monthly premiums are paid by [Direct Debit](#)

## 3. Policy start date

We'll need to know the date the employer would like to start cover in advance.

## 4. Annual renewal date

If the quoted annual renewal date is changed, we'll need to adjust the unit rate guarantee period to align. Please contact your Legal & General Sales Account Manager if you need further details.

## 5. Assumptions and other changes

You'll need to check if our quote included any assumptions and make sure they're correct. We group them together on the quote for quick reference. Please contact your Legal & General Sales Account Manager if any of our assumptions are wrong. Our scheme underwriters will need to check any new information you provide to see if we need to update or withdraw our quote.

Please contact your Legal & General Sales Account Manager if you're aware of any errors in the details supplied for the accepted quote, or any new information that could mean your client is more likely to claim.

## 6. Employer details

You'll need to confirm the Principal Employer's Companies House registration. If not registered with Companies House, please confirm the principal business address and details of its registration with any professional body or authority it may be registered with.

The principal employer is responsible for paying premiums, providing the information we need and submitting claims on behalf of itself and the participating employers.

Please contact your Legal & General Sales Account Manager if your client wishes to operate differently, we may need to separate the cover into different policies.

## 7. Participating Employers

You'll need to provide name, registered address and registration number or principal address and any applicable registrations for each participating employer to be included within the policy. If using the L&G master trust these can only be UK companies.

## 8. Previous medical underwriting

Fill in our [Switch Terms declaration](#) to tell us about anyone who has previously been medically underwritten. Alternatively, you can send us the previous insurer's acceptance terms.

## 9. Membership data

We need membership data that's accurate on the day the policy starts, and need you to supply up-to-date details if it's changed since we quoted. We'll base our deposit premium on the quote data, and adjust the policy account when the accurate data is provided to us.

## 10. Intermediary Contact

Please confirm details of the ongoing contact for the new policy. If on a direct basis please put the contact at your company who will deal with all day to day administration.

## 11. Payment Details

Providing bank account details in advance for refunds and claims can help speed up these payments.

You don't need to provide bank account details if the premiums are paid by direct debit. Any refunds will be returned to the account the premiums were paid from.

You don't need to supply bank details for claims if the employer has chosen to use our Mastertrust or for a Critical Illness Cover policy.

## 12. Absentees

We need to know about any person to be insured who is absent or working reduced hours or duties because of:

- an illness or injury that has prevented them working their full hours or duties for at least three months; or
- a terminal illness or injury.

Please contact your Legal & General Sales Account Manager if the information supplied for the quote has changed. Depending on the details you supply, we may need to change or withdraw our quote. If you don't tell us about an absentee, we may not pay a claim.

## 13. Mastertrust

You'll need to confirm the scheme or schemes the employer has chosen to pay death in service benefits through. Please tick all options that apply.

If the employer has chosen to use a Legal & General Mastertrust, they'll need to complete the relevant application:

- [Registered Mastertrust Application](#)
- [Relevant Life \(EGLP\) Mastertrust Application](#)

## 14. Employer Scheme details

We'll only need to know extra details about a scheme if the principal employer has chosen to pay benefits through its own scheme. If the principal employer has appointed other trustees to run the scheme, please provide their details on the [Additional Trustee form](#).

We need the pension scheme tax reference (PSTR) number if you are using your own registered scheme. If PSTR being obtained we can set up if the Pension Scheme Office (PSO) number is supplied. If using your own Excepted scheme (EGLP) please provide the date it came in force i.e. date of execution.

If the employer uses more than one registered scheme or more than one EGLP (Relevant Life Policy) scheme, please provide details of each scheme in the Additional Notes section of this form. We'll also need to know which quote categories are associated with each scheme.



# Useful documents



[BACS details](#)

[Direct Debit mandate](#)

[Switch terms declaration](#)

[Tele-interview contact sheet](#)

[Additional trustee form](#)

[Group Life Mastertrust application](#)  
(Registered)

[Relevant Life Mastertrust application](#) (EGLP)

## Data Protection

The employer will need to send us personal information about its employees who are, or will become, eligible for cover. This may include medical and health information. The employer will need to satisfy itself of a legal basis that allows it to send us these details.

The way we collect, use, store and share information is extremely important to us. Our Privacy Policy explains how we collect and process personal information.

Our full Privacy Policy is available at:  
<https://www.legalandgeneral.com/privacy-policy/>.

**Please share our Privacy Policy with the employer so it, and its employees, understand what we do with the information we collect.**

## Fraud Prevention

The details provided to Legal & General may be shared with fraud prevention agencies who will use it to prevent fraud and money-laundering as well as to verify identity. If fraud is detected, certain services, finance, or employment could be refused. Further details of how personal information will be used by Legal & General and these fraud prevention agencies, and data protection rights, can be found by accessing <https://www.legalandgeneral.com/privacy-policy/>.

## Sanction Checks

The policy is not suitable for any entity that is, or is at risk of being, sanctioned under any United Kingdom, European Union, United States of America or United Nation sanctions programs, or which has any related entities (such as a parent or subsidiary), employees or officers that are or maybe subject to such a program.



# Additional Notes

Please use this page to update us with the requested details of any participating employers and any other additional information that we've requested or you'd like to make us aware of.

