



## 2. About the member

### 2.1 Mr/Mrs/Miss/Ms/Other

Member's surname

Member's forename  
(including any middle names)

Member's date of birth  
(DD/MM/YYYY)

Member's National Insurance number

Member's address

Postcode

Member's personal email address

Member's telephone number

### 2.2 On what date did the member: (DD/MM/YYYY)

### 2.3 Membership category (where the scheme has more than one category)

Date of entry into category (where the  
scheme has more than one category)  
(DD/MM/YYYY)

Member's occupation (please describe as  
fully as possible)

Date the member last worked  
(DD/MM/YYYY)

Please note that we won't be able to  
proceed with the claim assessment  
without this information

Member's earnings

The amount of benefit being claimed  
under the policy

### 2.4 Has the member's level of benefit changed since joining the Scheme?

Start employment

Become a Member of the Scheme (even if the scheme was not  
insured with us)

Actual earnings

£

Scheme earnings

£

£

Yes  No

If 'yes', please provide details below.

## 2. About the member continued

2.5 Is the member still in your employment and included in the Scheme?

Yes  No

If you have answered 'No' to question 2.5, please tell us when the member left your employment? (DD/MM/YYYY)

2.6 If the member is the subject of the claim, have they been absent before with the same or similar condition?

Yes  No  N/A

If you have answered 'Yes' to question 2.6, please provide details below.

## 3. About the member's partner or child



The policyholder should complete questions 3.1 to 3.5, if the claim is being submitted on behalf of the Member's Spouse, Registered Civil Partner, unmarried Partner or Child (where covered.)

Otherwise, go straight to section 4, the 'Policyholder's declaration'.

3.1 Surname

3.2 Forename(s)

3.3 Date of birth  
(DD/MM/YYYY)

3.4 Relationship to the member:

3.5 Date they became eligible for inclusion  
(DD/MM/YYYY)

  
  
  
  

## 4. 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](http://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.

## 5. Policyholder's declaration

We declare that the above statements are accurate and complete and that the above **member** is eligible, in accordance with the terms and conditions of the **policy** and the plan issued by Legal & General Assurance Society Limited (Legal & General).

We confirm we have the explicit consent of the person(s) named in this form, or have other legal basis, to provide Legal & General this information and any further information (including medical or health information) that is required.

We hereby authorise and instruct Legal & General Assurance Society Limited to pay benefit arising from this claim under the **policy** to the **insured member**. By carrying out this instruction, Legal & General Assurance Society Limited is:

- fully discharged from its liabilities to the **principal employer** in respect of all benefits arising from this claim; and
- fully indemnified from any further claim by the **principal employer** in this respect.

Signature

X

Print name

Date  
(DD/MM/YYYY)

Position in the  
company/firm



Please tell us if the information you have provided changes.

## 6. What happens next?

When you've filled in this form, you should send it to Legal & General Assurance Society Limited. Please tell us if your circumstances or any of the information provided on this form changes.

## Contact us



**0345 026 0094**

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



[groupprotection.benefitsmanagement@landg.com](mailto:groupprotection.benefitsmanagement@landg.com)  
[legalandgeneral.com/employer/group-protection/](http://legalandgeneral.com/employer/group-protection/)



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

**Legal & General Assurance Society Limited.**  
Registered in England and Wales No.00166055.  
Registered office: One Coleman Street, London EC2R 5AA.

W8309 11/23 NON GASD

