

Onboarding Details

This is our new simplified onboarding form that replaces our previous proposal form.

Accepted quote reference	
Premium frequency	
Policy start date	
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.

Assumptions and other changes	Are the quote assumptions correct? Yes No		
	<i>If you selected No, please contact your Legal & General Sales Account Manager before completing this form.</i>		
Principal employer	Business name		
	Registered address <i>(Principal address if not registered with Companies House)</i>		
	Employer contact name	Employer email	
	Companies House number <i>(if registered)</i>	Alternative registration details <i>(If not registered with Companies House, please give alternative registration details. For example, registration with a professional body or the Charity Commission.)</i>	
Participating employers			
	Click here to add more Participating employers		
Previous medical underwriting			
	<i>Please use the drop-down to confirm how details will be provided if necessary, refer to section 7 on page 2 for guidance.</i>		
Membership data			
Intermediary contact	Firm name		
	Name		
	Email		
	Number		
Payment details (optional) <i>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 10 on page 2 for more guidance.</i>	Premium refunds <i>(if not paid by direct debit)</i>		Claim payments <i>(if different)</i>
	Account name		Account name
	Account number		Account number
	Sort code		Sort code

Information only needed for death in service policies:

Absentees			
	<i>Section 11 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.</i>		
Mastertrust	Legal & General Group Life Mastertrust (Registered)	Other <i>(please provide details of other mastertrusts in the employer scheme details below)</i>	
	Legal & General Relevant Life Mastertrust (EGLP)		
Employer scheme details <i>If the employer is not using our Mastertrust, please provide further details here.</i>		Registered	EGLP
	Scheme name		
	Pension scheme tax reference		
Trustees <i>(Mandatory)</i>		Principal employer Other trustees <i>(I'll supply details using the Additional trustee form)</i>	Principal employer Other trustees <i>(I'll supply details using the Additional trustee form)</i>

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.

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 and Participating Employers

You'll need to confirm the details used for each employer's Companies House registration. If an employer isn't 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. 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.

8. 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.

9. Intermediary Contact

Please confirm details of the ongoing contact for the new policy.

10. 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.

11. Absentees

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

- an illness or injury that has prevented them working their full hours 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.

12. Mastertrust/own scheme

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.

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](#).

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.

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](#)



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.

