

Care Provider Declaration

Lifetime Care Plan

Once you've completed this form, please return it to:

Legal & General Retirement
PO Box 809
Cardiff
CF24 0YL

You can also email this form to lcp@landg.com. We require all signatures to be signed by hand.

Please don't send any confidential information by unencrypted email, as this is not secure. If you do not have your own secure email solution, please send a blank email to lcp@landg.com, with the subject 'Legal & General Secure Email Request'. We will then send you an invitation to log in to our secure email system, which you can use to return the form securely.

About this form

You have been asked to complete this form as one of your clients who is in receipt of your care (or their legal representative) has applied for a Lifetime Care Plan (an Immediate Needs Annuity) with Legal & General.

The Lifetime Care Plan makes monthly payments on behalf of a Care Recipient to a care provider for the rest of the Care Recipient's life, to enable the Care Recipient to cover some, or all, of their care costs.

Where payments are made to a UK Registered Care Provider*, under tax current law we will make payments without deduction of tax. You will be asked to confirm whether you are a UK Registered Care Provider in this form. A definition of UK Registered Care Provider is available below.

In order to set this plan up, we require you, the care provider, to complete this form so that we can make the payments as per the terms and conditions of the plan.

All details must be completed by an authorised representative of the care provider. We will not be able to commence payments until this declaration is returned to us.

* UK Registered Care Provider as defined in section 726 of the Income Tax (Trading and Other Income) Act 2005, but only where such provider is:

- a) providing care in England and is registered under Part 2 of the Care Standards Act 2000 or Chapter 2 of Part 1 of the Health and Social Care Act 2008;
- b) providing care in Wales and is registered under Part 2 of the Care Standards Act 2000;
- c) providing care in Scotland as, or as part of, a service which is registered under Part 1 of the Regulations of Care (Scotland) Act 2001; or
- d) providing care in Northern Ireland and is registered either under (a) Part 2 or 3 of the Registered Homes (Northern Ireland) Order 1992, or (b) Part 3 of the Health and Personal Social Services (Quality, Improvement and Regulation) (Northern Ireland) Order 2003, in each case, where such registration is in respect of the provision of care.

1 Care provider details

1. Are you a UK Registered Care Provider?

Yes No

 **Important: you must inform us immediately if your registration status changes so that we can ensure that the Lifetime Care Plan is taxed appropriately.**

2. Company name

3. Registration body

4. Registration number

5. Contact details

Address

Postcode

Phone number

Email address

Form fields for company name, registration body, registration number, address, postcode, phone number, and email address.

2 Care provider bank details

1. Sort code

2. Account number

3. Account holder's name

4. Preferred payment reference
(so you can identify the Care Recipient's payments)

Form fields for sort code, account number, account holder's name, and preferred payment reference.

3 Care Recipient's details

1. What is their full name and title?

Mr/Mrs/Miss/Ms/Other

Surname

First name(s)

2. What is their date of birth?

3. Date they entered care

4. Total care fees per month

Form fields for name and title, surname, first name(s), date of birth, date they entered care, and total care fees per month.

How can I contact you?

There are several different ways of getting in touch with us.

You can call us on

0345 070 2459

Lines are open Monday to Friday, 9am to 5pm.
We may record and monitor calls. Call charges will vary.

You can email us at

lcp@landg.com

If you're contacting us by email please don't send any confidential information by unencrypted email, as this is not secure.*

You can write to us at

**Legal & General Retirement,
PO Box 809, Cardiff CF24 0YL**

You can visit our website at

legalandgeneral.com/retirement

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Easier to read information

Please call us on **0345 070 2459** if you are visually impaired and would like this document in Braille, large print, audio tape or CD.

Legal & General Assurance Society Limited

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