



## 1 About the scheme from which the monies will be paid (continued)

8. In whose name will the policy be issued? Only applies to the Open Market Option. For transfers into Legal & General Personal Pension Scheme No.1, the policy grantee and trustee is Legal & General so this question is not applicable.
9. If the policy is to be issued in the name of the trustee, who do you want future correspondence to be addressed to?
10. Is there a required start date for the annuity? Only applies to the Open Market Option. If there is no required start date, we will start the annuity payment as soon as we have received all necessary information and the payment.
11. What is the percentage of the standard Lifetime Allowance being used up by the annuitant? Only applies to the Open Market Option. The percentage must include any cash sum being paid in association with the annuity.

N/A     Annuitant     Trustee

If trustee, please state the trustee's name below

Annuitant     Trustee

N/A     No     Yes

If 'yes', what is the required date?

%

## 2 About the transfer value or purchase amount

1. What is the total transfer value or purchase amount?
2. Does this represent the full value of the existing plan?
3. Is the transfer value or purchase amount in respect of a death of a member while in service?
4. Do the Scheme rules or legislation require that any part of the annuity increases in payment? Only applies to the Open Market Option.
5. From the sum given in question 1, what is the cash value of:

Non protected rights – please provide a total amount or a split between pre and post April 1997 benefits

Section 9(2B) rights

6. Has any tax-free cash already been paid?

£

No     Yes

No     Yes

No     Yes

If 'yes', please provide us with a split between pre and post April 1997 benefits where requested in question 5 below.

Total	<input type="checkbox"/>	N/A	£ <input type="text"/>
or Pre 6 April 1997	<input type="checkbox"/>	N/A	£ <input type="text"/>
Post 5 April 1997	<input type="checkbox"/>	N/A	£ <input type="text"/>
Total	<input type="checkbox"/>	N/A	£ <input type="text"/>

N/A     No     Yes

If 'yes' how much £

 If you have answered 'yes' to question 6, Legal & General can only accept the application on an Open Market Option basis.

7. How much is the Guaranteed Minimum Pension (GMP), if this applies?  
Please enter the amount at both today's value and the amount at State pension age.

Pre 1988 GMP	<input type="checkbox"/>	N/A	Post 1988 GMP	<input type="checkbox"/>	N/A
In today's value			In today's value		
£ <input type="text"/>	each year		£ <input type="text"/>	each year	
Amount at State pension age*			Amount at State pension age*		
£ <input type="text"/>	each year		£ <input type="text"/>	each year	

\* For GMP purposes this is age 60 for women, 65 for men.

### 3 About the scheme rules

 Only applies to the Open Market Option.

1. Do the scheme rules impose a maximum on the amount of pension income to be provided?
2. If 'yes', what is the maximum annual pension income at today's date?
3. What is the maximum annual pension income for a spouse, registered civil partner or dependant at today's date?

<input type="checkbox"/> No	<input type="checkbox"/> Yes
<input type="text" value="£"/> each year	
<input type="text" value="£"/> each year	<input type="checkbox"/> N/A

### 4 About the pension and divorce

1. Does this application relate to a pension credit?
2. If 'yes', does the pension credit arise from benefits which were already in payment?
3. If 'no', is there an attachment order in force in respect of the pension to which the payment in question 1 relates?

<input type="checkbox"/> No	<input type="checkbox"/> Yes
<input type="checkbox"/> No	<input type="checkbox"/> Yes
<input type="checkbox"/> No	<input type="checkbox"/> Yes

If 'yes', supply copy wording

### 5 Trustee payment instruction

 Only applies if the payment is going to the trustee AND the application relates to the Open Market Option.

1. Does this part apply to you?

<input type="checkbox"/> No	<input type="checkbox"/> Yes	If 'no' go straight to Part 6
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If 'yes' please complete your details below.

Name of bank or building society

Address

Postcode

<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
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Sort code

<input type="text"/>	<input type="text"/>	-	<input type="text"/>	<input type="text"/>	-	<input type="text"/>	<input type="text"/>
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Account number

<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
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Account holder's name

Building society roll number (if applicable)

<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
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## About the payment method

1. How is the transfer or purchase money to be paid to Legal & General?  
Legal & General would prefer you pay by direct credit.

If paying by telegraphic transfer or direct credit, also indicate the date on which the payment will be made.

By direct credit on

By telegraphic transfer on

By cheque (**cheques should be made payable to 'Legal & General Assurance Society Limited'**)

Legal & General's bank details are

Barclays Bank Plc

Address

Cheapside Business Centre  
London EC2


Sort code

-  -

Account number

Pay

Legal & General Assurance Society Limited

 For telegraphic transfers and direct credits, the 12 digit quote number should be used as the reference number.

## Declaration

 **The declaration must be read and signed by the trustee or administrator of the originating scheme.**

### All applicants

We declare that the information provided is full and accurate to the best of our knowledge. We confirm that the member's benefits are within their Lifetime Allowance, or that any Lifetime Allowance charge has been calculated and paid by us and no further charge is due.

### Only applies to applications relating to Open Market Option

We agree that the full terms and conditions of the policy(ies), a copy of this application form and a copy of the chosen quote(s) will be available to the owner of the policy(ies).

Where the annuity is to be paid directly by Legal & General to the annuitant, we authorise and request Legal & General to deduct any tax due from the annuity in accordance with instructions from the appropriate Inspector of Taxes, and to account to the Inspector of Taxes for any tax so deducted.

We declare that the information given complies with the provisions of the scheme or policy from which the purchase amount has arisen.

We confirm that the amount of any Guaranteed Minimum Pension (GMP) is correct. If the GMP liability is greater than that notified in this application, then the liability remains with the trustees or administrator.

We agree that where the policyholder is the trustee or administrator, responsibility for ensuring that (where applicable) scheme maximum benefit limits are not infringed remains with the trustee or administrator.

We agree that where the policyholder is the annuitant, Legal & General's liability is limited to the annuity that will be bought and that if any further liability arises then that remains with the trustee or administrator.

We confirm that our scheme or policy has been registered with, or approved by, HM Revenue & Customs under the reference number quoted.

If available, we have paid any cash sum required by the annuitant and understand that Legal & General will not pay any part of the purchase amount in cash form.

We request or acknowledge that Legal & General pay an annuity to the scheme member or policyholder on the basis set out in their application form and in the chosen quote.

After accepting this application, Legal & General agrees to pay an annuity in accordance with the basis given in this application.

### On behalf of the trustees or administrators of the originating scheme or contract

Signature

Date

# Contact us

Call us on

**03457 654 465**

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

Email us at

**[annuities.quotes@landg.com](mailto:annuities.quotes@landg.com)**

Online

**[www.legalandgeneral.com](http://www.legalandgeneral.com)**

**Legal & General Assurance Society Limited.**

Registered in England and Wales No. 166055

Registered office: One Coleman Street, London EC2R 5AA

Legal & General Assurance Society Limited is authorised by the Prudential Regulation Authority and regulated by the Financial Conduct Authority and the Prudential Regulation Authority.

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