

1. About the deceased (continued)



You only need to complete this section if the death occurred overseas. Please ensure that you send the original death certificate along with an official translation otherwise the claim could be delayed.

Date of departure from the UK (DD/MM/YYYY)

D	D	M	M	Y	Y	Y	Y
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Country where death occurred

Intended date of return to UK (DD/MM/YYYY)

D	D	M	M	Y	Y	Y	Y
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Purpose of visit
e.g. holiday/business

2. About the scheme

Group policy number

Scheme joining date (DD/MM/YYYY)

D	D	M	M	Y	Y	Y	Y
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Date appointed partner (if different from joining date) (DD/MM/YYYY)

D	D	M	M	Y	Y	Y	Y
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Membership category (where more than one)

Category joining date (DD/MM/YYYY)

D	D	M	M	Y	Y	Y	Y
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3. Benefit claimed

The benefit claimed must be in accordance with the contract of insurance and you should ensure that the deceased was eligible. If this is the first claim under the policy or the Trustee bank details have changed, please provide the bank details on the policyholder's headed paper.

Amount claimed

£

Trustees' bank account number

Trustees' bank sort code

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Trustees' bank account payee name

Benefit Direct to Beneficiaries

Would you like to pay the benefit directly to the beneficiaries?

Yes No

If you ticked 'yes' please complete and return the **'Pay Direct to Beneficiaries Instruction'** form.

4. Documents enclosed



We cannot accept copies as any certificates issued by a Registrar (for example, birth and death certificates) are protected by Crown copyright. This means they cannot be lawfully copied without the consent of HMSO.

Please send us an original certificate confirming the death if:

- The partner died outside of the UK.
- You're sending us this form within 10 working days of the death being registered.
- Only a coroner's interim certificate has been issued.
- The claim exceeds £1.25 million.

For most other circumstances we're able to confirm deaths without seeing the original death certificate. If we cannot, we'll ask you for the original certificate and explain why it's needed.

5. Fraud prevention

The personal information Legal & General collects from you and/or the deceased's firm 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

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.

6. Declaration and undertaking by policyholder (If the firm is the policyholder, a senior partner needs to sign)

We declare that the information given above is correct and that the deceased was entitled to the benefits shown at the date of death.

Signature for and on behalf of the trustees



Date (DD/MM/YYYY)

D	D	M	M	Y	Y	Y	Y
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Name in BLOCK CAPITALS

Name of reference for correspondence

Contact us



0345 026 0094

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



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Legal & General Assurance Society Limited

Registered in England and Wales No. 00166055

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Authorised by the Prudential Regulation Authority and regulated by the Financial Conduct Authority and the Prudential Regulation Authority.

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