

IMPORTANT INFORMATION

This information may be downloaded to your PC in whole or in part provided that any reproduction or copy, or any derivative, is true to the original, and it is EITHER used for personal use OR in support of an Agreement with Legal & General. Professional advisers who are properly authorised may use it in the process of giving financial advice relating to Legal & General products.

Copies or derivatives of the document may not be sold, marketed, or used for commercial gain.

Notwithstanding the above, Legal & General Assurance Society Limited retains ownership of copyright in all such reproductions, copies or derivatives.

Copyright © Legal & General Assurance Society Limited, 2006.
Temple Court, 11 Queen Victoria Street, London EC4N 4TP. All rights reserved.

Over 50s Life Insurance Plan Trust Form

Help to ensure your loved ones receive the benefits from your Over 50s Life Insurance Plan. Simply complete the enclosed, short form.

Authorised and regulated by the Financial Services Authority

Legal & General Assurance Society Limited
Registered in England No. 166055
Registered Office: Temple Court,
11 Queen Victoria Street, London EC4N 4TP
www.legalandgeneral.com

W10948 04/06 Non-GASD Approval Date: 28/02/06



Introduction

You may wish to complete and return this trust form to make sure that Legal & General knows who you want to receive the money from the policy when you die. This could avoid any legal delays in confirming who should receive the money.

Once you have signed the trust, you cannot cancel or alter it (except as shown in 'Trust provisions' overleaf).

When completing the trust form:

- Please use black or blue ballpoint pen.
- Please do not use correction fluid or correction pens.
- The grantee must initial any changes to the form – simply cross through any mistakes or changes and write the new details above or below it.
- Please ask us for a new form if you need one.
- If you have any questions about the form, please phone us on 08700 10 40 80. Calls to this number will be charged at the national rate. For your protection we may record and monitor calls.
- If, after sending this form you wish to make any changes, please write to the Trust Team, Legal & General Assurance Society Limited, 2 Montefiore Road, Hove, East Sussex, BN3 1SE, who will send you the necessary forms.

Note: The trustee's job is to claim from Legal & General and distribute the policy benefits to the beneficiaries. Trustees should be permanently resident in the UK. A beneficiary can also be a trustee if they are over 18 years old and of sound mind.

I appoint the following additional trustees who accept their appointment by their signatures:

4 – Who do you want to appoint as additional trustees?	
First additional trustee	
Full name	
Address	
Signature	
Second additional trustee	
Full name	
Address	
Signature	

Trust provisions

I declare that the trustees will hold the policy named in Question 1 on an irrevocable trust for the benefit of those named in Question 3 'potential beneficiaries', in such shares and in such manner as the trustees (being at least three in number or a trust corporation) shall at their absolute discretion appoint by deed or deeds revocable or irrevocable and executed no later than 24 months after the death of the life assured and if no appointment is made or so far as no such appointment shall extend for the benefit of those named in Question 2 'current beneficiaries' in equal shares, unless stated otherwise.

The grantee may appoint and remove trustees.

Grantee's signature									
Signed	Date <table border="1" style="display: inline-table; vertical-align: middle;"> <tr> <td> </td><td> </td><td> </td><td> </td><td> </td><td> </td><td> </td><td> </td> </tr> </table>								

To be completed by Legal & General:

Date received	<table border="1" style="display: inline-table; vertical-align: middle;"> <tr> <td> </td><td> </td><td> </td><td> </td><td> </td><td> </td><td> </td><td> </td> </tr> </table>								