

## **Legal & General application for lifetime annuity**

**HARGREAVES  
LANSDOWN**

### **Trustee/Administrator section**

#### **Member information**

Member name: \_\_\_\_\_ Quotation number: \_\_\_\_\_

#### **Scheme information**

Name of scheme or arrangement: \_\_\_\_\_

Name and address of administrator or insurer:

Email address of administrator or insurer: \_\_\_\_\_

Pension scheme tax reference number: \_\_\_\_\_ R \_\_\_\_\_

#### **Transfer details**

Is this: Open Market Option  or Transfer to L&G Personal Pension Scheme No. 1

Is the transfer being made as part of a block transfer? Yes  or No

#### **For Open Market Options only**

What is the percentage of the standard lifetime allowance used up by this benefit? (Based on the gross pension fund including any tax free cash taken): \_\_\_\_\_ %

In whose name will the policy be issued? Annuitant  or Trustee

Please state name of Trustee: \_\_\_\_\_

Is there a required start date for the annuity? Yes  or No

Start date: \_\_\_\_ / \_\_\_\_ / \_\_\_\_\_ (see [www.gov.uk/hmrc-internal-manuals/pensions-tax-manual](http://www.gov.uk/hmrc-internal-manuals/pensions-tax-manual))

#### **Transfer/Purchase amount**

What is the total transfer value or purchase amount? £ \_\_\_\_\_

Has any tax-free cash already been paid? Yes  or No  If Yes, how much? £ \_\_\_\_\_

#### **Divorce**

If the member has been divorced, is there an earmarking/attachment order in force? (Not applicable if this application relates to a pension credit)

Yes  or No  If Yes, please supply a copy of the order with this application.

#### **Payment method**

How is the payment being made? (Bank transfers are preferred).

Cheque  Bank transfer  on date: \_\_\_\_ / \_\_\_\_ / \_\_\_\_\_

Account name: Legal and General Assurance Society Ltd

Sort code: 20-19-90, Account Number: 60410772.

Please use the 12 digit quotation number as a reference.

## Declaration – to be read and signed by the trustee or administrator of the originating scheme

### **A – All applicants**

We declare that the information provided is true and complete (including that in the member's section where the declaration at the end of that section has not been signed by the annuitant) to the best of our knowledge. Where the member's section has not been signed by the applicant, we declare 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.

### **B – Only applicable to applications relating to the open market option**

We understand that the full terms and conditions of the policy(ies), a copy of this application form and a copy of the chosen quotation(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.

Where the policyholder is the trustee or administrator, we declare that the trustee or administrator of the pension scheme or policy is responsible for ensuring that (where applicable), scheme maximum benefit limits are not infringed.

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 this application form and in the chosen quotation.

Upon acceptance of this application, Legal & General agrees to pay an annuity in accordance with the basis given in this application.

On behalf of the trustees or administrator of the originating scheme or contract:

Signed: \_\_\_\_\_

Date: \_\_\_ / \_\_\_ / \_\_\_\_\_

Once completed, please email this form to [retirementservice@hl.co.uk](mailto:retirementservice@hl.co.uk).