



POLICY APPLICATION

You'll need to complete this application form to apply for a Defined Benefit Crest Policy with Royal London.

1 Important information

Please read this section carefully before completing this application form.

- Please use BLOCK CAPITALS and black ink when completing this Policy application form.
- This application form should be completed and signed by you as the trustees of the Scheme detailed in section 2 below.
- You should keep a copy of this application form and any additional forms you send to us. You can request a copy of this completed application form from us at any time.
- If you need any help when completing this application form, please speak to your adviser or your Royal London contact.

2 Scheme details

Please complete this section with the details of your Scheme.

Scheme name

Scheme number

PSTR number

4 Declaration

The trustees must complete this section, then sign and date it.

We, the trustees of the Scheme detailed in section 2, hereby:

1. Request The Royal London Mutual Insurance Society Limited (“Royal London”) to issue to us a policy or policies securing benefits for members of the Scheme;

2. Authorise

whom failing

to act on our behalf in all matters concerning the administration of the Scheme and to give discharges for monies payable to the trustees, unless Royal London have previously received express written notice of the revocation of such authority. Unless otherwise instructed, correspondence concerning the Scheme should be marked “Private and Confidential” and sent to the following person:

The above authority does not extend to alterations to, or discontinuances of, the group policy or policies;

3. Authorise and request Royal London to pay instalments of any pension arising under the group policy or policies to those persons who are entitled to pension in terms of the rules of the Scheme and to deduct the appropriate amount of tax from each instalment in accordance with PAYE tables in force and remit such tax to HMRC;

4. Confirm that we understand that should Royal London demutualise within a period of 3 years from the later of the date that this application is accepted by Royal London, or the date that Royal London receives the first premium paid under this application, we will not be entitled to any compensation for loss of membership rights in respect of the premiums covered by this application;

5. Confirm that the information that we have provided on this application form is correct and true to the best of our knowledge and belief. We have read the answers not filled in by us and we confirm that these are correct.

Trustee signature

Date

Trustee signature

Date

Trustee signature

Date

Trustee signature

Date

Trustee signature

Date

Director/Company Secretary

Date

Director/Company Secretary

Date

Notes

- If individual trustees are in office, each of them should sign in their capacity as trustee.
- If a corporate trustee is in office, two directors or one director and the company secretary should sign on behalf of the corporate trustee.



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All literature about products that carry the Royal London brand is available in large print format on request to the Marketing Department at Royal London, St Andrew House, 1 Thistle Street, Edinburgh EH2 1DG.

All of our printed products are produced on stock which is from FSC® certified forests.

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