



Protection

Additional information

You should use this form to capture the additional information requested with your quote.

Please return to: 22 Haymarket Yards, Edinburgh EH12 5BH.

Please complete this form if:

- Your application is on a joint life second event basis, and
- You wish to exercise the separation or conversion option, and
- The amount of cover is more than £2.5 million.

If your amount of cover is more than £4 million, we'll normally ask for independent evidence to confirm the details.

Examples of independent evidence may include:

- An accountant's or solicitor's letter confirming the value of your estate.
- A copy of the inheritance tax planning exercise.

Please give joint assets and liabilities proportionately.

Financial information

How we use your data

We need to make it clear how we'll use your personal information.

We'll use your data to administer the policy, additional underwriting activity and if you make a claim.

We may share your information with selected third parties for assessing and servicing your application. More details can be found within our privacy notice: royallondon.com/protectionprivacy

Impact of misrepresentation

- Please answer all questions accurately and honestly and to the best of your knowledge and belief. If you're not sure about including any information, then you should include it.
- If you miss any information out, give us wrong, incomplete or misleading information, or don't tell us about changes, it could mean we won't pay out if you have to make a claim. It could also result in your plan being cancelled or amended if this affects the terms we would have offered you.
- You must tell us if there is a change to any of the answers given to the questions or any other information provided between the date the answer was given and the date we start, re-start or change the plan.

Further help and support

If you need any help with filling in this form, please contact us on **0345 6094 500**.

You can visit our Health and wellbeing directory at royallondon.com/healthandwellbeing which includes a list of organisations providing help and advice to support your mental and physical health.

Financial information continued

Please give details of joint assets and liabilities proportionately.

	Person 1	Person 2
Name of person covered	<input type="text"/>	<input type="text"/>
Plan number (if known)	<input type="text"/>	<input type="text"/>
Please give details of the assets of each person covered, providing an individual breakdown of items and amounts. <ul style="list-style-type: none"> • Property 	Description	Description
	<input type="text"/>	<input type="text"/>
	Value £ <input type="text"/>	Value £ <input type="text"/>
<ul style="list-style-type: none"> • Investments (please provide a detailed breakdown) 	Description	Description
	<input type="text"/>	<input type="text"/>
	Value £ <input type="text"/>	Value £ <input type="text"/>
<ul style="list-style-type: none"> • Others (please specify) 	Description	Description
	<input type="text"/>	<input type="text"/>
	Value £ <input type="text"/>	Value £ <input type="text"/>
Total value	£ <input type="text"/>	£ <input type="text"/>

Financial information continued

	Person 1	Person 2
Please give the liabilities of each person covered, providing an individual breakdown of items and amounts.	Description	Description
	<input style="width: 100%; height: 50px;" type="text"/>	<input style="width: 100%; height: 50px;" type="text"/>
<ul style="list-style-type: none"> • Property 	Value £ <input style="width: 50px;" type="text"/>	Value £ <input style="width: 50px;" type="text"/>
<ul style="list-style-type: none"> • Investments (please provide a detailed breakdown) 	Description	Description
	<input style="width: 100%; height: 50px;" type="text"/>	<input style="width: 100%; height: 50px;" type="text"/>
	Value £ <input style="width: 50px;" type="text"/>	Value £ <input style="width: 50px;" type="text"/>
<ul style="list-style-type: none"> • Others (please specify) 	Description	Description
	<input style="width: 100%; height: 50px;" type="text"/>	<input style="width: 100%; height: 50px;" type="text"/>
	Value £ <input style="width: 50px;" type="text"/>	Value £ <input style="width: 50px;" type="text"/>
Total value	£ <input style="width: 50px;" type="text"/>	£ <input style="width: 50px;" type="text"/>
What is the total inheritance tax liability?	£ <input style="width: 50px;" type="text"/>	£ <input style="width: 50px;" type="text"/>
Please explain how the inheritance tax liability is calculated. If the sum assured doesn't match the calculated inheritance tax liability, please explain the reason for the difference here.	<input style="width: 100%; height: 50px;" type="text"/>	<input style="width: 100%; height: 50px;" type="text"/>
Please provide the name of the person who's calculated the valuation	<input style="width: 100%; height: 20px;" type="text"/>	<input style="width: 100%; height: 20px;" type="text"/>

If you need more space, please use the additional information section on page 3.

Please sign and date this declaration to confirm the following statements:

- You acknowledge and agree that the details in this additional information form, along with all other information you have given us, and your original application form and the plan details, will together define the terms of your proposed contract with us.
- You declare that the answers on this form are true and complete to the best of your knowledge and belief and that you'll inform us if any information in this form is missing or inaccurate. We'll then have the right to change or withdraw terms if appropriate.
- You acknowledge and agree that if you miss any information out, give us wrong, incomplete or misleading information, or don't tell us about changes, it could mean we won't pay out if you have to make a claim. It could also delay the processing of your application or result in your plan being cancelled or amended should it affect the terms we would have offered.

Client declaration

	Person 1	Person 2
Signature	<input type="text"/>	<input type="text"/>
Date	<input type="text"/>	<input type="text"/>

Assignee declaration

	Person 1	Person 2
Signature	<input type="text"/>	<input type="text"/>
Date	<input type="text"/>	<input type="text"/>

Trustee declaration

	Person 1	Person 2
Signature	<input type="text"/>	<input type="text"/>
Date	<input type="text"/>	<input type="text"/>



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royallondon.com

**We're happy to provide your documents in a different format, such as braille,
large print or audio, just ask us when you get in touch.**

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