

Group Life Insurance

Request to assume risk for a Lump Sum & DIS Pension Policy

This form is divided into 3 parts:

If you do not complete all the required fields, we may not be able to assume risk on the intended day.

Part A

Requests details of the companies to be included, the discretionary trust being used and up to date information of the individuals to be covered.

Parts B & C

Requests information which was not provided when our quote was provided but is needed before we will be able to assume risk.

Note

We may still request additional information before being able to confirm risk is in place.

Clarification may also be sought after we have confirmed risk to ensure an accurate Policy is issued.

If you have any questions regarding the completion of the form or the submission process, please call us on **0345 223 8000**.

Important information

This form can be completed by:

- an authorised official of the company who want to place cover with us, or
- their appointed financial adviser.

In order to place cover with Canada Life, please make sure the correct parts of this form are **fully completed and returned to us by 4.00pm on the day before risk is to commence**.

How to return your form

By email

grouponrisk@canadalife.co.uk



Scanned or photographed images of the completed form can be emailed.

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Part A

1 Intermediary details

Intermediary name

Financial Services Registry Number

2 Required policy

Accepted quote reference

Proposed commencement date

 - -

Annual revision date

 -

Name of previous insurer (if applicable)

Is the transfer on exactly the same basis (If No please provide full details of the changes required on page 8)

Yes

No

3 Principal employer details

Name

Companies House Registration Number

Correspondence address (if different to Registered Address)

Postcode

4 Associated employers details

Insufficient space below? Please use page 8 to provide information on any other employers.

Name

Companies House Registration Number

Name

Companies House Registration Number

Name

Companies House Registration Number

Name

Companies House Registration Number

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5

Trust and Registration details (Please refer to Canada Life's Trust page on our [website](#) to find specimen Deeds)

Please complete as appropriate the type of Trust which is going to be used to hold the liabilities insured:
(YOU SHOULD NOT PROCEED FURTHER WITHOUT A TRUST IN PLACE).

Insufficient space below? Please use page 8 to provide information on any additional trusts.

Registered Trust being used			
Standalone Trust		Canada Life Master Trust	
Date the Trust was executed	<input type="text"/> <input type="text"/> - <input type="text"/> <input type="text"/> - <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>	Date the Trust was executed	<input type="text"/> <input type="text"/> - <input type="text"/> <input type="text"/> - <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>
HMRC PSTR number		HMRC PSTR number	00820237RK
Scheme Name (As shown in the executed trust)		Scheme Name (As shown in the deed of participation – click to download)	Canada Life Group Life Master Trust on behalf of
Excepted Trust being used			
Standalone Excepted Trust		Excepted Solution Trust	
Date the Trust was executed	<input type="text"/> <input type="text"/> - <input type="text"/> <input type="text"/> - <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>	Date the Trust was executed	<input type="text"/> <input type="text"/> - <input type="text"/> <input type="text"/> - <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>
Scheme Name (As shown in the executed trust)		Scheme Name (As shown in the executed Excepted Solution trust)	Excepted Solution Group Life Scheme
IMPORTANT INFORMATION			
Please ensure the relevant Proposal form is completed in line with the type of scheme selected. Please call us on 0345 223 8000 for any assistance			

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Part A – continued

6 Supplementary quote information

Please refer to our quotation before completing this section. We are unable to assume risk until all additional requirements have been confirmed.

Please tick if the quote data is **not** to be used for inception accounts

Other than those previously advised please confirm:

If there are any members who do not meet the Actively At Work Requirements + on the proposed commencement date, including members in receipt of disability benefit, absent through sickness or injury for a period greater than 3 months or working reduced hours due to sickness or injury.	Yes	No
If there are any members who are not insured for their full benefit or whose medical decision has changed since the original quote was requested e.g. restricted, declined, postponed or accepted on non-standard terms. Copies of decision letters will need to be provided.	Yes	No
If there are any claims you haven't already informed us of.	Yes	No
If there are any members requiring cover overseas.	Yes	No
If there are any members traveling overseas (excluding the European Union and North America).	Yes	No

If you answer 'Yes' to any of the above, appropriate details should be provided on page 8.

We reserve the right to amend or withdraw the quotation if there are any members who have not been underwritten on standard terms, or if there are any long term absentees that you have not previously told us about. Further details may be required. Please provide to GroupOnRisk@canadalife.co.uk



Actively at work means that a person:

- is present at their place of work, and
- has not received medical advice to refrain from work, and
- is mentally and physically capable of performing fully the normal regular duties associated with the job they are engaged to do, and
- is working their normal contracted number of hours, either at their normal place of work or at a place that the business requires.

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Part B – Lump Sum Benefits

1 Eligibility and scheme information

Insufficient space below? Please use page 8 to provide information on any other categories.

	Categories of cover		
	Category 1	Category 2	Category 3
Eligibility + (e.g. All employees including / excluding directors)			
Entry date (e.g. daily, specified date)			
Minimum / Maximum Age at Entry (if any)			
Minimum service requirement			
Cease age (maximum)			
Salary definition ++			
Salary sacrifice to be insured			

+ Helpful Hint – Eligibility

- To adhere to data protection legislation we will not include any individual names on Group Policies
- The term ‘senior’ can only be used if clearly defined
- If Non-Executives or Consultants is to be used please clearly define and confirm who holds contracts of employment

Please note that cover for any of the above cannot be guaranteed.

++ Helpful Hint – Salary definition

Basic salary may not be appropriate for all contract types e.g. zero hour or fixed contract employees.

Other more appropriate salary definitions which can be insured are (but are not limited to):

- Earnings received in previous 12 months
- Salary / earnings fixed on each ‘annual revision date’ for the following 12 months

Consideration could be given to insuring a fixed benefit.

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Part B – Lump Sum Benefits continued

1 Eligibility and scheme information – continued

If any of the categories on the previous page is linked to a membership of a pension scheme please complete the following in respect of associated pension scheme, if different to the information already provided.

	Categories of cover		
	Category 1	Category 2	Category 3
Pension scheme eligibility			
Entry date (e.g. daily, specified date)			
Minimum / Maximum Age at Entry			
Name of Pension Scheme (please confirm type of pension scheme i.e. DB / DC)			

Part C – Death in Service Pension Details

1 Trust and Registration details (Please refer to Canada Life's Trust page on our [website](#) to find specimen Deeds)

Please complete regarding the Trust which holds the liabilities insured:
(YOU SHOULD NOT PROCEED FURTHER WITHOUT A TRUST IN PLACE).

Insufficient space below? Please use page 8 to provide information on any additional trusts.

Date the Trust was executed	<input type="text"/> <input type="text"/> - <input type="text"/> <input type="text"/> - <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>
HMRC PSTR number	
Scheme Name (As shown in the executed trust)	

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Part C – Death in Service Pension Details continued

2 Eligibility and scheme information

Insufficient space below? Please use page 8 to provide information on any other categories.

	Categories of cover		
	Category 1	Category 2	Category 3
Eligibility + (e.g. All pension scheme members)			
Entry date (e.g. daily, specified date)			
Minimum / Maximum Age at Entry			
Minimum service requirement (if any)			
Cease age (maximum)			
Salary definition ++			
Salary sacrifice to be insured			
Accrual Rate (if pension based on perspective pension)			
Prospective Service used in calculation (if pension based on perspective pension)			
Pension scheme eligibility (if linked and different to the above)			
Name of Pension Scheme (please confirm type of pension scheme i.e. DB / DC)			

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Additional information

Please enter below any other information which has not been provided elsewhere in this form.

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