

IMPORTANT INFORMATION

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Legal & General Annuities

Application Form

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

S410 03/06 Approval number: H63503



Notes about this application

You should ensure you understand the key features of this contract before you buy

Please note that Legal & General will not accept this application if it is for a transfer to Legal & General Personal Pension Scheme No. 1. or Buy Out Plan for immediate vesting and a Lifetime Allowance charge applies because you will have exceeded your Lifetime Allowance by taking these benefits.

If the application is for an Open Market Option and you have exceeded your Lifetime Allowance, Legal & General will only consider the application if the Lifetime Allowance charge has already been paid by the scheme.

The checklist below states what needs to be enclosed, what should be signed and dated and what other important information you and your Adviser need to know.

1 Proof of name and age:

- Your birth certificate, passport, or a birth certificate verification form that adheres to the Association of British Insurers (ABI) guidelines and confirms that your Financial Adviser has seen proof of your name and age
- Your marriage certificate (*only required if you are a married woman or wish to provide a pension for a spouse*)
- Your spouse's or dependant's birth certificate (*only required if you wish to provide a pension for a spouse or dependant*)
- Your decree absolute (*only required if you are retaining your married name after a divorce*)
- A copy of the deed poll if you have changed your name by this means
- Your Registered Civil Partnership Certificate (*only required if you wish to provide a pension for your Registered Civil Partner, or have changed your surname following a Civil Partnership*).

2 For taxation purposes enclose:

- P45 (parts 2 and 3) for this tax year, if applicable (*without this, basic rate tax will be applied to your payments until we receive confirmation of the correct tax code from your tax office*). The P45 will not be returned to you
- If Legal & General makes payments before receiving confirmation of your tax code, and later learns that you have paid too much tax, Legal & General will return the overpaid tax to you by adjusting the next instalment of your annuity
- A copy of your Enhanced and/or Primary Protection certificate from HM Revenue & Customs (if applicable). If you rely on an enhanced certificate, we will assume that you are still eligible. There are circumstances when an enhanced protection certificate can become invalid. If you are unsure about your continuing eligibility, please speak to your financial adviser.

3 What needs to be signed and dated:

- The Financial Adviser's instruction on page 4 must be signed and dated by the Adviser
- The Declarations on pages 8 and 9 must be signed and dated by the person who will receive the benefits (except where the annuity is to be purchased on the open market by the trustees of a pension scheme)
- The Declaration on page 14 must be signed and dated by the originating provider or insurer (not applicable for single contributions for immediate retirement). Where we ask for values or amounts at today's date, this will be as at the date that the trustees/administrators Declaration is signed and dated.

4 Information you should note:

- Legal & General will obtain confirmation of any tax-free cash already paid to you from the originating scheme, if applicable.
- Legal & General will not pay any tax-free cash if this application is for an open market option.
- If Legal & General has the responsibility of paying out any tax-free cash, this payment will be made at the same time as the policy is put into force.
- For transfers into a Legal & General Personal Pension or Buy Out Plan, the maximum tax-free cash will not exceed 25% of the value of the fund. The only exception to this is if the member is entitled to a higher tax-free cash sum by registering with HMRC for Primary or Enhanced Protection.
- An Immediate Vesting transfer will be administered on the basis that it is not part of a block transfer. Please refer to HMRC's Registered Pension Schemes manual for further information on block transfers.
- Legal & General must receive the funds with the specified requirements from the originating provider or insurer, or in the case of single contributions for immediate retirement, from you, within 18 days of the original quote date in order to guarantee the rates quoted.

- Legal & General will not make a payment to anyone except the annuitant or the scheme trustees
- Limits may apply to the benefits that can be paid or provided under the scheme rules
- Transfers to a Buy Out Plan which contain benefits in respect of BOTH GMP/S9 (2B) and Protected Rights will be housed in two separate annuity policies
- Annuitants must have a permanent National Insurance number
- All payments are made in British Pounds Sterling. Any conversion to another currency will be at the expense of the annuitant
- Legal & General will not honour oral quotations
- Legal & General do not accept cases in respect of bankrupt individuals
- The Civil Partnership Act 2004 (CPA) came into force on 5 December 2005. The CPA is designed to provide a system of registration for same sex relationships. Registered civil partners will be in a relationship akin to marriage in respect of the laws of survivorship and benefits. As such, all references to the rights and benefits of a spouse or widow(er) in any of our literature will apply equally to married couples and registered civil partners
- Legal & General will return your original certificates to you.

5 What the Adviser should do with this application:

Applications for single contributions for immediate retirement:

Send us the completed Adviser's page, member's section and a cheque for the single contribution, made payable to "Legal & General Assurance Society Limited".

For all other applications:

Send us the completed Adviser's page, Member's Section and either:

- A. the completed Trustee or Administrator Section(s) and the cheque (if not paid by Direct Credit) or;
- B. forward the Trustee or Administrator Section(s) to the originating scheme provider(s).

If the proceeds of more than one policy are being paid to us, please complete one Trustee or Administrator Section for each policy. Please make sure that the member fully completes the Member's Authority Section at the top of page 10 with each Trustee or Administrator's Section submitted.

Please ensure that you contact the originating scheme to arrange for the surrender of the current contract. This also applies if the fund to buy the annuity originates from a Legal & General policy and you will need to contact the claims area responsible for that product.

6 Return address:

Please fully complete the relevant sections of this application form, include any supporting documentation that is required (see earlier notes) and send to:

Legal & General Annuities
 PO Box 809
 Cardiff
 CF24 0YL

If the application is not returned to this address it could cause delays in processing which might cause the annuity figures to decrease.

Once the application has been received by us, we will allocate a case controller. The case controller has a dedicated phone number which will appear on any correspondence.

For Advisers or selling agents

Please fill in your details and complete the checklist below, sign and date it and ensure that the applicant has provided the information and enclosures we need to process the application – see page 2.

Are you a member of an IFA network?

No <input type="checkbox"/>	Yes <input type="checkbox"/>	If yes, which one? <input type="text"/>
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If the originating scheme is an EPP or SSAS, or the application is for single premiums for immediate retirement, you must include a money laundering form with this application. Please confirm below that this has been done:

N/A <input type="checkbox"/>	No <input type="checkbox"/>	Yes <input type="checkbox"/>
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If you are not attaching the completed Trustee or Administrator's Section of this application, you must send it directly to the originating scheme provider or insurer and confirm below the date that it was despatched:
(Not applicable for single contributions for immediate retirement)

Section attached <input type="checkbox"/>	Section was despatched (day/month/year): <input type="text"/> / <input type="text"/> / <input type="text"/>
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Please note: If the proceeds of more than one policy or scheme are being paid to us, please complete one Trustee or Administrator's Section for each policy or scheme. Please make sure that the member fully completes the Member's Authority Section at the top of page 10 with each Trustee or Administrator's Section submitted.

What is your Legal & General agency number? If the wrong number is given, this will delay or prevent the payment of commission.

<input type="text"/>

What is your phone and fax number?

Phone <input type="text"/>	Fax <input type="text"/>
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Financial Adviser's instruction: As the Financial Adviser it is your responsibility to forward the quotation, cancellation notice, key features document and terms and conditions booklet to your client.

Declaration

Full name of firm	
Principal Financial Services Authority (FSA) firm registration number	
Appointed representative FSA firm registration number	
FSA individual/agency number	
Address	
<input type="text"/>	
<input type="text"/>	
Signed	Date
Name	Email address
Job title	
Basis of Advice Declaration	
To meet Financial Services Authority (FSA) Regulatory Reporting Requirements, Legal & General must record whether advice was given to your client regarding the sale of this product. Please tick the box below.	
Was advice given?	Yes <input type="checkbox"/> No <input type="checkbox"/>

As the agent who has submitted this application, if the product applied for is a transfer to Legal & General Personal Pension Scheme No. 1. or Buy Out Plan, I hereby instruct Legal & General to record this pension transfer under my firm's agency details as stated above.

Signature:

<input type="text"/>

Date (day/month/year):

<input type="text"/> / <input type="text"/> / <input type="text"/>
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MEMBER'S SECTION – to be completed by the Scheme Member

Legal & General quotation number(s) to which this application refers:

Without this information, we will not accept your application

Type of product required:

- 1) Open market option (with benefits subject to the rules of the originating scheme)
- 2) Transfer of the full fund to the Legal & General Personal Pension Scheme No.1 (followed by immediate retirement under the rules of the receiving scheme)
- 3) Transfer of the full fund to the Legal & General Buy Out Plan (followed by immediate retirement under the receiving contract)
- 4) Single contribution to the Legal & General Personal Pension Scheme No.1 (followed by immediate retirement under the rules of the receiving scheme)

If 1, 2 or 3 above applies, have you received a cancellation notice?

No

Yes

Please note: you should only complete and return the cancellation notice if you **do not** wish to proceed with your annuity with Legal & General

Part 1 About you

First or single applicant

Spouse, Civil Partner or dependant

1 What is your full name?

(only complete if you wish to provide a pension for this person)

Mr, Mrs, Miss, Ms, other

Surname

First name(s)

Mr, Mrs, Miss, Ms, other

Surname

First name(s)

2 What is your date of birth?

(day/month/year) / /

(day/month/year) / /

3 What is your sex?

Male Female

Male Female

4 What is your marital status?

Single Married, Registered Civil Partner

Widowed

Single Married, Registered Civil Partner

Widowed

5 What is your current permanent residential address including postcode?

Please check that you have filled in your postcode as this is essential for processing the application more quickly

Postcode

As first applicant

Postcode

6 What is your preferred contact phone number and contact time?

Work

Home

Mobile

Time

Work

Home

Mobile

Time

First or single applicant	Spouse, Civil Partner or dependant
7 What is your National Insurance number?	(Only complete if you are providing a pension for this person)
<input style="width: 100%; height: 20px;" type="text"/>	<input style="width: 100%; height: 20px;" type="text"/>
8 What is your tax district and reference number?	
<input style="width: 100%; height: 20px;" type="text"/> <input style="width: 100%; height: 20px;" type="text"/>	<input style="width: 100%; height: 20px;" type="text"/> <input style="width: 100%; height: 20px;" type="text"/>
	9 What is your relationship to the first applicant? For example, husband, wife or partner. Only applicable to joint applications.
	<input style="width: 100%; height: 20px;" type="text"/>

Part 2 Your payment instruction

Please give details of where pension payments are to be paid. Note that any tax due will usually be deducted before you receive each payment.

If this application relates to the open market option and the scheme trustees or administrator give different instructions, their information will be used instead of the details given below.

1 What is the name of your Bank or Building Society?

2 What is the address of your Bank or Building Society? Please include postcode

<input style="width: 100%; height: 100%;" type="text"/>
<input style="width: 100%; height: 100%;" type="text"/>

3 Branch Sort Code:

<input style="width: 20px; height: 20px;" type="text"/>	<input style="width: 20px; height: 20px;" type="text"/>	-	<input style="width: 20px; height: 20px;" type="text"/>	<input style="width: 20px; height: 20px;" type="text"/>	-	<input style="width: 20px; height: 20px;" type="text"/>	<input style="width: 20px; height: 20px;" type="text"/>
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4 Bank or Building Society account number:

5 Name of account holder: This must be an account of which you are either the sole or joint account holder.

6 Building Society Roll number: Only applicable to Building Society Accounts

N/A	<input style="width: 20px; height: 20px;" type="checkbox"/>	<input style="width: 95%; height: 20px;" type="text"/>
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If your application is for a single contribution for immediate retirement, please go straight to part 4.

Part 3 About the transferring or purchasing scheme(s)

This section is not applicable to applications for single contribution for immediate retirement.
Please give details about each of the transferring or purchasing scheme(s):

	Legal & General Quote ref.	Name of provider	Fund Value	Policy or reference number
1	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
2	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
3	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
4	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
5	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
6	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

Please go straight to part 5

Part 4 About your contribution for immediate retirement

1. How much would you like to pay as a single contribution for immediate retirement?

<input type="text"/>	Net of basic rate tax
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Please make your cheque for the net amount payable to 'Legal & General Assurance Society Limited'. The minimum contribution is £1,000 net.

Legal & General will add basic rate tax relief at the rate applicable when the single contribution is paid (22% for the tax year 2005/2006) and pay the gross amount into your plan. We will then arrange for the immediate purchase of an annuity with the fund. If you are a higher rate tax payer, any additional relief must be applied for when you complete your tax return.

2. How much would your employer like to pay as a single contribution for immediate retirement?

<input type="text"/>

This is the amount that will be applied to your plan.

Part 5 About your benefits

If you have obtained primary protection from HM Revenue & Customs (HMRC) for an increased Lifetime Allowance, please supply the following details:

a) Your personal Lifetime Allowance as a percentage of the standard Lifetime Allowance (£1.5m for the tax year 2006/2007).

%

This will be shown on your primary protection certificate, which you must attach to this form.

b) Have you taken any benefits from any other Registered Pension Scheme (this does not include State benefits)?

Yes No

c) If you have answered 'yes' to b) above, please provide the following details about the benefits you have taken:

	Benefit 1	Benefit 2	Benefit 3
Date the benefit was taken	<input type="text"/>	<input type="text"/>	<input type="text"/>
Percentage of the standard Lifetime Allowance used up by this benefit	<input type="text"/>	<input type="text"/>	<input type="text"/>
Amount of tax-free cash taken	<input type="text"/>	<input type="text"/>	<input type="text"/>

If you have more than three benefits to tell us about, please write the details on a separate sheet of paper and attach it to this application.

Part 6 Declaration The declaration must be read and signed by the applicant.

Please remember that it is a serious offence to make false statements; the penalties are severe and could lead to prosecution.

A All applicants

I understand that this application and my chosen quotation will form the basis of the annuity to be paid to me. I further understand that no benefits under this arrangement are capable of assignment, surrender or commutation except as provided in the relevant legislation and subject to the agreement of Legal & General Assurance Society Limited.

I declare the above statements, including those contained in my chosen quotation, are true and complete answers to the best of my knowledge and belief and agree if any information is found to be incorrect, benefits will be adjusted accordingly.

Use of personal information: Legal & General takes customer privacy very seriously. Legal & General uses the personal information collected via this form and any other information that I provide to Legal & General ("my information") for the purposes of:

1. Providing me with Legal & General products and services and dealing with my enquiries and requests;
2. Underwriting and administering my policy including processing claims;
3. Carrying out market research, statistical analysis and customer profiling; and
4. Sending me marketing information (by post, telephone, email and SMS) about products and services of companies in the Legal & General group and of third parties whose products and services Legal & General offers to its customers.

By signing below, I agree to receive the information as described in 4 above, unless I indicate otherwise by ticking this box

Given the global nature of Legal & General's business, it may be necessary to transfer my information to countries outside the European Economic Area in order to provide Legal & General's services to me.

Disclosures: Legal & General will disclose my information to other companies within the Legal & General group of companies, regulatory bodies, law enforcement agencies, future owners of Legal & General's business, suppliers engaged by Legal & General to process data on its behalf and when necessary, to a reinsurer.

If I make a claim, Legal & General will share my information (where necessary) with other insurance companies to prevent fraudulent claims.

If I have been dealing with a financial adviser, Legal & General will give them information about the product and, where appropriate, provide them with other information about my dealings with Legal & General to enable the financial adviser to give me informed advice.

Where I have been introduced to Legal & General by a bank or a building society, Legal & General will share my information with them to enable them to:

- (a) carry out market research, statistical analysis and customer profiling; and
- (b) send me marketing information about their products and services and products and services of companies in the Legal & General group and of third parties whose products and services Legal & General offers to its customers.

By signing below, I agree to receive the information as described in (b) above by post or telephone, unless I indicate otherwise by writing to Legal & General at Legal & General Assurance Society, P O Box 274, Bangor, BT19 7WZ.

Access: I have the right to ask for a copy of my information in return for payment of a small fee. To obtain a copy of my information, I should write to Legal & General at UKSO Business Standards, Legal & General Assurance Society Limited, Brunel House, Cardiff, CF24 0EB.

To comply with Money Laundering Regulations, my identity needs to be verified. This is achieved by using credit reference agencies to search sources of information relating to me (an "Identity Search"). This will not affect my credit rating. I agree to the use of my information as set out above.

I understand that I can ask you for a copy of my completed application form and the terms and conditions of the contract.

I can confirm that this application refers to Legal & General Quote No(s):

(Enter Legal & General Quote No(s), to which this application refers)

B Only applicable to applications relating to the open market option or where the fund is being transferred into the Legal & General Personal Pension Scheme No.1 or Buy Out Plan

I authorise and request Legal & General to contact my previous Scheme trustees or the administrators or insurers of my Retirement Annuity, Personal Pension Scheme, deferred annuity or trust scheme and to obtain on my behalf necessary information concerning my pension benefits.

If I have been contracted-out under the other scheme, then I agree to Legal & General calculating the part of the transfer payment to be treated as relating to contracting out benefits, if the scheme trustees do not provide you with this figure.

C Only applicable to applications relating to the open market option or Scheme annuity purchase

I request the trustees or administrators of the scheme or policy which holds my non-commuted benefits to purchase from Legal & General Assurance Society Limited an annuity for my benefit on the basis set out in this application.

D Only applicable if the fund is being transferred into the Legal & General Personal Pension Scheme No.1

The Scheme Administrator on behalf of the Provider agrees to administer the Scheme in accordance with the scheme rules.

I authorise Legal & General to accept the transfer value and understand that on receipt of the transfer value, Legal & General will apply this sum to a Personal Pension Plan and that, on acceptance of the transfer value by Legal & General, the trustees' or administrators liability to me in respect of the originating scheme benefit ceases.

E Only applicable if the fund is being transferred into the Legal & General Buy Out Plan

I authorise Legal & General to accept the transfer value and understand that on receipt of the transfer value, Legal & General will apply this sum to a Buy Out Plan and that, on acceptance of the transfer value by Legal & General, the trustees' or administrators' liability to me in respect of the originating scheme benefit ceases.

F Only applicable if the fund is being transferred into the Legal & General Personal Pension Scheme No.1. or Buy Out Plan or a single contribution is being paid to Legal & General Personal Pension Scheme No.1

I confirm that the total value of

- i) the benefits to which this application relates, and
- ii) all other private pension benefits* which I am receiving or have received from any pension scheme registered with or approved by HM Revenue & Customs (HMRC) and
- iii) any benefits under such a scheme payment of which is being initiated from the same date as the benefits to which this application relates, and
- iv) any benefits I have transferred to a qualifying recognised overseas pension scheme

does not exceed my Lifetime Allowance ** for the tax year in which I become entitled to the benefits to which this application relates.

IF YOU ARE UNABLE TO SIGN THIS DECLARATION THEN LEGAL & GENERAL WILL NOT ACCEPT YOUR APPLICATION

If you have obtained either Enhanced or Primary Protection from HMRC, you must attach a copy of your certificate to this application.

NOTES

* "private pension benefits" means pensions and/or lump sums arising from any pension scheme that is registered with or approved by HMRC. This does not include any state pensions, tax-free cash sums received before 6 April 2006 or benefits you have received as a result of the death of another person.

** The Standard Lifetime Allowance is £1.5 million for the tax year 2006/2007 and £1.6 million for the tax year 2007/2008.

Please note that after your annuity has been set up, you will be provided with a notification of the percentage of the standard Lifetime Allowance used as a result of taking this benefit. This may be a different percentage from that given in your quotation, because the actual value of the funds received may vary from your quotation. If this results in your total benefits exceeding your Lifetime Allowance, it may affect the benefits payable.

I confirm that I will not use any of the tax-free cash sum

- to pay a contribution to a registered pension scheme, or
- to reimburse a contribution to a registered pension scheme paid by any employer or a third party.

G Only applicable to single contributions to the Legal & General Personal Pension Scheme No.1

I confirm that

- In this tax year I am resident in the UK or am a Crown servant or the husband, wife or Registered Civil Partner of a Crown servant.
- The contributions which I pay to all Registered Pension Schemes in a tax year to which I am entitled to tax relief will not exceed the higher of the basic amount (£3,600 for tax year 2006/2007) and my relevant UK earnings.
- As far as I know, the information I have given and declarations I have made in this application are, to the best of my knowledge and belief, correct and complete. I also agree this will form the basis of my application.
- I agree to comply with the rules of the scheme.

ALL APPLICANTS

First or single applicant

Signature:

Date (day/month/year):

- **Please now send this part of the application form (pages 4 to 9 inclusive) to
Legal & General Annuities, PO Box 809, Cardiff, CF24 0YL**
- **For authorisation purposes, please now complete the Member's Authority at the top of page 10 and then pass the trustees/administration section on to the trustees or administrator of the scheme.**
- **Pages 10 to 14 inclusive should be completed by the trustees or administrator of the originating scheme.**

7 What is the SCON or ASCON, if applicable?

N/A

8 In whose name will the policy be issued? Only applicable to the open market option. For transfers into the Legal & General Personal Pension Scheme No. 1 or Buy Out Plan, the policy grantee and trustee is Legal & General so this question is not applicable.

N/A Annuitant Trustee If trustee, please state the trustee's name below:

9 Is there a required start date for the annuity? Only applicable to the open market option.
 If there is no required start date, we will start the annuity payment as soon as we have received all necessary information and the payment.

N/A No Yes If 'yes', what is the required date? (day/month/year) / /

10 What is the percentage of the standard Lifetime Allowance that is being used up by this benefit?
 Only applies to an Open Market Option.
 The percentage must include any associated cash lump sum taken from this benefit.

%

Part 2 About the Transfer Value or Purchase Amount

1 What is the total transfer value or purchase amount?

£

2 Does compulsory escalation apply? If so you need to supply us with the split to this transfer value or purchase amount.
 Only applicable to the open market option.

No Yes If 'yes', you must provide us with a split between pre and post April 1997 benefits where requested in question 3 below.

3 From the sum given in question 1, what is the cash value of:

A Non Protected Rights/Non Safeguarded Rights - please provide a total amount or a split between pre and post April 1997 benefits								
Total:	N/A	<input type="checkbox"/>	£ <input type="text"/>	or	Pre 6 April 1997:	N/A	<input type="checkbox"/>	£ <input type="text"/>
					Post 5 April 1997:	N/A	<input type="checkbox"/>	£ <input type="text"/>
B Protected Rights - please provide a total amount or a split between pre and post April 1997 benefits								
Total:	N/A	<input type="checkbox"/>	£ <input type="text"/>	or	Pre 6 April 1997	N/A	<input type="checkbox"/>	£ <input type="text"/>
					Post 5 April 1997	N/A	<input type="checkbox"/>	£ <input type="text"/>
C Section 9(2B) Rights			D Safeguarded Rights					
Total:	N/A	<input type="checkbox"/>	£ <input type="text"/>	Total:	N/A	<input type="checkbox"/>	£ <input type="text"/>	

4 Has any tax-free cash already been paid?

N/A No Yes If 'yes', how much? £
 If you have answered 'Yes' to this question, and wish to transfer benefits to the Legal & General Personal Pension Scheme No.1 or Buy Out Plan Legal & General cannot accept the transfer.

5 Is there a required pension amount? Only applicable if paid as an open market option from a defined benefit scheme

N/A	<input type="checkbox"/>	No	<input type="checkbox"/>	Yes	<input type="checkbox"/>	If 'yes', how much?			
						Pre 6 April 1997:	N/A	<input type="checkbox"/>	£ <input type="text"/>
						6 April 1997 to 5 April 2005:	N/A	<input type="checkbox"/>	£ <input type="text"/>

Please note, we cannot accept any benefits accrued after 5 April 2005 from a defined benefit scheme.

6 How much is the Guaranteed Minimum Pension (GMP), if applicable?
Please enter the amount at both today's value and the amount at State Pension Age.

A Pre 1988 GMP	N/A	<input type="checkbox"/>	In today's value:	£ <input type="text"/>	each year	Amount at State Pension Age*:	£ <input type="text"/>	each year
B Post 1988 GMP	N/A	<input type="checkbox"/>	In today's value:	£ <input type="text"/>	each year	Amount at State Pension Age*:	£ <input type="text"/>	each year

* For GMP purposes this is age 60 for women, 65 for men.

Part 3 About the scheme rules

- 1 Does this application relate to an open market option? No Yes
- If NO, go straight to Part 4.
 - If YES, continue with question 2.
- 2 Is there a scheme maximum pension required by the scheme rules? No Yes
- 3 What is the maximum annual pension at today's date?

£ <input type="text"/>	each year
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4 What is the maximum annual pension for a spouse, Registered Civil Partner or dependant at today's date?

N/A	<input type="checkbox"/>	£ <input type="text"/>	each year
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Part 4 About the Pension and Divorce

If the member has been divorced, is there an Attachment Order in force?
Not applicable if this application relates to a Pension Credit

N/A	<input type="checkbox"/>	No	<input type="checkbox"/>	Yes	<input type="checkbox"/>	If 'yes', please supply a copy of the Attachment Order with this application
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Part 5 Trustee Payment Instruction

Only applicable if the payment is going to the trustee and the application relates to the open market option. If this part is not applicable to you, tick here and go straight to Part 6.

1 What is the name of your Bank or Building Society?

<input type="text"/>

2 What is the address of your Bank or Building Society? Please include postcode

<input type="text"/>
<input type="text"/>
Postcode

3 Branch Sort Code:

<input type="text"/>	<input type="text"/>	-	<input type="text"/>	<input type="text"/>	-	<input type="text"/>	<input type="text"/>
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4 Bank or Building Society account number:

<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
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5 Name(s) of account holder(s):

<input type="text"/>

6 Payment Reference (if applicable):

<input type="text"/>

7 Building Society Roll number: Only applicable to Building Society Accounts

N/A <input type="checkbox"/>	<input type="text"/>
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Part 6 About the Payment Method

Please note:

- for Telegraphic Transfers and Direct Credits, the 11 digit quote number should be used as the reference number
- cheques should be made payable to 'Legal & General Assurance Society Limited'

1 How is the transfer or purchase money to be paid to Legal & General?

Legal & General would prefer you pay by Direct Credit.

If paying by Telegraphic Transfer or Direct Credit, also indicate the date on which the payment will be made

<input type="checkbox"/>	By Direct Credit on	<input type="text"/>	/	<input type="text"/>	/	<input type="text"/>	(day/month/year)
<input type="checkbox"/>	By Telegraphic Transfer on	<input type="text"/>	/	<input type="text"/>	/	<input type="text"/>	(day/month/year)
<input type="checkbox"/>	By cheque						

Legal & General's bank details are:

Address: Barclays Bank plc,
Cheapside Business Centre,
London EC2

Branch sort code: 20 - 19 - 90

Account number: 60410772

Pay: Legal & General Assurance Society Limited

Part 7 Declaration The declaration must 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 if the full fund is being transferred into the Legal & General Buy Out Plan

The scheme entitlement of the member or policyholder is being wholly secured by means of a policy or policies effected with Legal & General.

This application has been made on the understanding that the transfer value will, in the opinion of Legal & General, be sufficient at the time of payment to provide the contracting-out guaranteed benefits (if any). If for any reason this is not the case, the transfer value will be returned to the trustee or administrator and the entire application will be treated as cancelled.

We confirm that the benefits provided for this member are calculated on a basis that does not differentiate between males and females.

C 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.

We declare that the information given complies with current HM Revenue & Customs guidelines and that any Guaranteed Minimum Pension has been adequately covered.

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 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 administrators of the originating scheme or contract

Signature:

Date (day/month/year):

- Once completed, the form should be sent to: Legal & General Annuities, PO Box 809, Cardiff CF24 0YL.