Care Provider Declaration

Lifetime Care Plan

Once you've completed this form, please return it to:

Legal & General Retirement PO Box 809 Cardiff CF24 0YL

You can also email this form to Icp@landg.com. We require all signatures to be signed by hand.

Please don't send any confidential information by unencrypted email, as this is not secure. If you do not have your own secure email solution, please send a blank email to **lcp@landg.com**, with the subject 'Legal & General Secure Email Request'. We will then send you an invitation to log in to our secure email system, which you can use to return the form securely.



About this form

You have been asked to complete this form as one of your clients who is in receipt of your care (or their legal representative) has applied for a Lifetime Care Plan (an Immediate Needs Annuity) with Legal & General.

The Lifetime Care Plan makes monthly payments on behalf of a Care Recipient to a care provider for the rest of the Care Recipient's life, to enable the Care Recipient to cover some, or all, of their care costs.

Where payments are made to a UK Registered Care Provider*, under tax current law we will make payments without deduction of tax. You will be asked to confirm whether you are a UK Registered Care Provider in this form. A definition of UK Registered Care Provider is available below.

- In order to set this plan up, we require you, the care provider, to complete this form so that we can make the payments as per the terms and conditions of the plan.
- All details must be completed by an authorised representative of the care provider. We will not be able to commence payments until this declaration is returned to us.

- * UK Registered Care Provider as defined in section 726 of the Income Tax (Trading and Other Income) Act 2005, but only where such provider is:
 - a) providing care in England and is registered under Part 2 of the Care Standards Act 2000 or Chapter 2 of Part 1 of the Health and Social Care Act 2008;
 - b) providing care in Wales and is registered under Part 2 of the Care Standards Act 2000;
 - c) providing care in Scotland as, or as part of, a service which is registered under Part 1 of the Regulations of Care (Scotland) Act 2001; or
 - d) providing care in Northern Ireland and is registered either under (a)
 Part 2 or 3 of the Registered Homes (Northern Ireland) Order 1992,
 or (b) Part 3 of the Health and Personal Social Services (Quality,
 Improvement and Regulation) (Northern Ireland) Order 2003,

in each case, where such registration is in respect of the provision of care.



1 Care provider details 1. Are you a UK Registered Care Provider? No Important: you must inform us immediately if your registration status changes so that we can ensure that the Lifetime Care Plan is taxed appropriately. 2. Company name Registration body Registration number Contact details Address Postcode Phone number Email address Care provider bank details Sort code Account number Account holder's name Preferred payment reference (so you can identify the Care Recipient's payments) 3 Care Recipient's details

| 1. | What is their full name and title? | Mr/Mrs/Miss/Ms/Other | | | | | | | | | |
|----|------------------------------------|----------------------|---|---|---|---|---|---|---|---|--|
| | | Surname | | | | | | | | | |
| | | First name(s) | | | | | | | | | |
| 2. | What is their date of birth? | | D | D | M | M | Υ | Υ | Y | Υ | |
| 3. | Date they entered care | | D | D | M | M | Υ | Υ | Υ | Υ | |
| 4. | Total care fees per month | | £ | | | | | | | | |

4 Care provider agreement

Under the Lifetime Care Plan, Legal & General will be making monthly Payments in advance to the bank account details provided to cover part, or all, of the cost of the care services you are providing to the Care Recipient. You must, on request, confirm in writing that you have received a Payment.

In order for Payments made by Legal & General under the Lifetime Care Plan to qualify for exemption from income tax, the Care Recipient must be in receipt of chargeable care from you. Legal & General may have to share information regarding the care that you provide to the Care Recipient with its service providers and with HMRC. For more information, please refer to Legal & General's Privacy Policy at legalandgeneral.com/privacy-policy.

You agree that you will notify Legal & General immediately in the event of any change in circumstances such as changes to your registration status or ceasing to provide care for, or death of the Care Recipient. Where Payments from Legal & General have exceeded the cost of care provided (including as a result of the death of the Care Recipient), you must make Legal & General aware of any overpayments and refund them to us as soon as possible.

I/We give permission for Legal & General to use this information as described in the 'Care provider agreement' section above.

If you have any questions please email us at Icp@landg.com or call us on 0345 070 2459. We may record and monitor calls.

I/We agree to promptly provide Legal & General with all such information as set out in the 'Care provider agreement' section above.

To be completed in all cases:

Call charges will vary.

You must also notify Legal & General promptly of any complaints received from any customer in respect of whom Legal & General has made or is making payments and any matter which may result in you being unable to provide care or otherwise affect the standard of care provided (including any matter which may affect your financial condition and/or solvency), in each case, upon becoming aware of the same.

> Capitalised terms shall have the meanings given to them in the Terms and Conditions. The Care Provider Declaration is a legally binding document. All disputes thereunder will be governed by the laws of England and Wales and subject to the exclusive jurisdiction of the English courts.

> Any change to any information on this form will be notified to Legal & General immediately. I/We understand that Payment is made under the Plan until the Care Recipient is no longer in receipt of care provision (unless the Lifetime Care Plan is cancelled within 30 days by the Care Recipient) and that any difference between our care fees and the Payments received under the Lifetime Care Plan is the responsibility of the Care Recipient and/or the Care Recipient's family/representatives.

| 1. | What is your full name and title? | Mr/Mrs/Miss/Ms/Other | |
|----|--|----------------------|---------------|
| | | Surname | |
| | | First name(s) | |
| | | Position | |
| | | | |
| 2. | Written signature of care provider represent | ative | |
| | | | |
| | | Date | D D M M Y Y Y |

How can I contact you?

There are several different ways of getting in touch with us.

You can call us on

0345 070 2459

Lines are open Monday to Friday, 9am to 5pm. We may record and monitor calls. Call charges will vary.

You can email us at

lcp@landg.com

If you're contacting us by email please don't send any confidential information by unencrypted email, as this is not secure.*

You can write to us at

Legal & General Retirement, PO Box 809, Cardiff CF24 0YL

You can visit our website at

legalandgeneral.com/retirement

* If you do not have your own secure email solution, please send a blank email to **lcp@landg.com**, with the subject 'Legal & General Secure Email Request'. We will then send you an invitation to log in to our secure email system, which you can use to return the form securely.

Easier to read information

Please call us on **0345 070 2459** if you are visually impaired and would like this document in Braille, large print, audio tape or CD.

Legal & General Assurance Society Limited

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