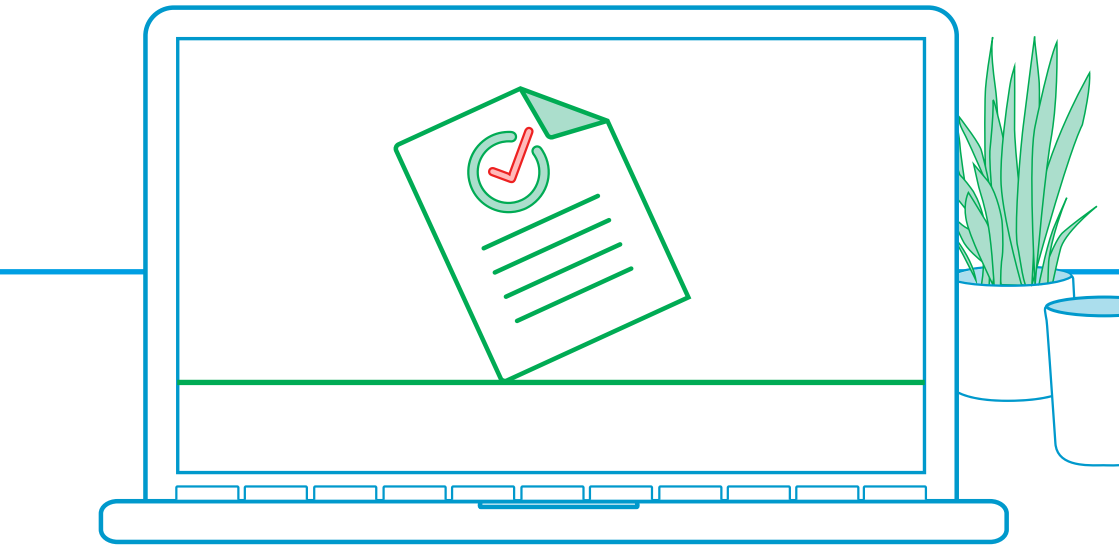
Put your trust in us

A guide to our new Online Trusts



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Legal & General

Online Trusts in a few easy steps

We believe putting a policy in trust is a good thing for your clients. That's why we've made it easier for you to set up a trust for your clients with our new online trusts.

When completing a new application in our online application platform 'Online Protection Connect' (OLPC), we've added a few simple extra steps that will set up a trust from the outset.

WHAT YOU DO

1

Choose to complete a trust

After the Underwriting section, choose to complete a trust.

2

Enter your clients details

Your clients will automatically be a trustee, fill in the name and address of at least one additional trustee and where applicable add the beneficiary's name.

3

Update the Application

'Update' the application, enter the start date. **The trust is now live.**

WHY CHOOSE ONLINE TRUSTS?

- **It's easy** - Complete the process online in just a few extra steps.
- **No more signatures or witnesses** - Trusts are in place from the outset, so no more delays in getting paperwork completed. This makes the process easier for you and your clients.
- **Enhanced features for split trusts** - Your clients now have more choice on how much terminal or critical illness benefit to retain and how much to put in trust.
- **Greater freedom** - We've made changes to our trusts that allow your clients to exercise product options without the trustee's permission such as declining their indexation option.

THE FOLLOWING TRUSTS ARE AVAILABLE ONLINE

- Flexible Trust or Discretionary Trust - Single Life Personal Protection
- Survivor's Trust - Joint Life Personal Protection
- Relevant Life Plan Trust - Relevant Life Plans
- Business Trust - Single Life Business Protection

ONCE THE TRUST IS LIVE YOU DON'T NEED TO DO ANYTHING ELSE. WE DO THE REST.

WHAT WE DO

We take it from here

We update our records to show the policy is in trust.

Advisers can access the trust online

You will be able to find the trust in the Documents section of Agent Hub in OLPC.

Your clients can review their trust online

Available for your clients in My Account.

For more information on online trusts, or to view our FAQs please visit:
www.legalandgeneral.com/trusts

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