

## Application for Group Life Trust

Please note Lutine Assurance do not provide Trust documentation incorporating Partners/Equity Partners. In this event we recommend you contact your legal advisers.

### Principal Employer

Registered Name:

---

Registered Number:

---

Contact Person:

---

Telephone Number:

---

### Participating Employers

Registered Name	Registered Address	Address
<hr/>	<hr/>	<hr/>
<hr/>	<hr/>	<hr/>
<hr/>	<hr/>	<hr/>
<hr/>	<hr/>	<hr/>

### Trustees

Who will act as Trustee for the Scheme in the first instance?

A. Participating or Principal Employer: Yes  No  **OR**

B. Individual Trustees: Yes  No

	Name	Address
Trustee 1	<hr/>	<hr/>
Trustee 2	<hr/>	<hr/>
Trustee 3	<hr/>	<hr/>

## Name of Scheme

---



---

## Expenses

**The expenses of establishing the scheme must be borne by the Principal Employer.**

Are ongoing administration expenses to be borne by the Principal Employer? Yes  No

Or are apportioned between the participating companies: Yes  No

**If expenses are to be apportioned is this**

As decided by the Principal Employer: Yes  No

Other (i.e. pro rata to number of members, pro rata to premium, etc.): Yes  No

Please specify:

---

## Power to Appoint New Trustees

Principal Employer? Yes  No

Trustees for the time being? Yes  No

Appointment subject to the consent of the other party? (Principal Employer/Trustee only) Yes  No

## Power to Amend the Scheme

Principal Employer? Yes  No

Trustees for the time being? Yes  No

Amendment to be subject to the consent of the other party? Yes  No

## Pensionable Pay

Please tick one of the following:

Basic salary at scheme anniversary:  PAYE earnings in previous year to 5 April:

Other: (please specify) \_\_\_\_\_

## Defaults by Beneficiary

Should Principal Employer have power (as is common in occupational pension schemes) to recover from the fund any sums it loses as a result of any criminal, negligent or fraudulent acts or omissions of the member?

Yes  No

## Storage of Documents

Where are the Trust Deed and related documents to be stored?

Name	Address
_____	_____
_____	_____
_____	_____

**Please fully complete this document and then return to Lutine Assurance, we will then supply a Trust Deed to be signed by the Trustees.**

Lutine Assurance Services Ltd. Registered in England number 2340151. Lutine Assurance Services is authorised and regulated by the Financial Services Authority. Lutine Assurance Services acts for certain Syndicates at Lloyd's of London and other authorised UK Life Assurance Companies. Registered Offices: Sidcup House, 12-18 Station Road, Sidcup, Kent, DA15 7EX