

Group Life Assurance

Risk details form

Accepted quote reference

In order to place cover with Canada Life, please make sure you

- fax or send this form to our Bristol office in advance of the commencement of risk. The latest we can accept instruction to go on risk is 4.00pm on the day before risk is to commence.
- use **BLOCK CAPITALS** where possible. You may attach a separate sheet showing the requested information.

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

Section A – Intermediary details

Your FSA number

Section B – Employer details

Principal employer's
registered name
and address
including postcode

Principal employer's Companies House registration number

Companies House registration numbers
for any other employers included

Section C – Confirmation of current insurance and claims experience

The scheme is currently insured or has been insured in the last 12 months.

If 'Yes', please complete the rest of this section, otherwise proceed to the next section.

Yes No

Name of previous insurer

There have been no claims in the last 5 years

There have been further claims, which I have not told you about, which I have set out separately

You have been given full information on all claims to date

Note that if there are additional claims, we may revise the cost shown in the quotation.

Section D – Pension scheme take up rate

This section should only be completed if cover is required for pension scheme members only.

Take up rate
%

The take up rate is the number of pension scheme members divided by the number of employees eligible to join the scheme, multiplied by 100.

Example: 25 pension scheme members and 10 people who have opted out of the pension scheme.
Total eligible = 35 and take up rate is $25/35 \times 100 = 71.4\%$

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Section E – Confirmation of additional requirements

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

	There are no members in this category	Full information has been given to you and this has not altered	There is new information which I have set out separately
E1 Members in receipt of disability benefit or absent through sickness or injury for a period of greater than three months.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
E2 Members who have been restricted, declined, postponed or accepted on non standard terms.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
E3 Members who are resident outside the UK.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
E4 Members in early retirement or redundancy (only complete if these covers are required)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

An actively at work condition normally applies to insured schemes where there are fewer than 50 lives and to previously uninsured schemes. The requirements for employees who do not satisfy the actively at work requirements are shown in the technical guide.

We reserve the right to amend or withdraw our 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.

Employees resident outside the UK are not included unless we have agreed to include them.

E5 Any other information requested under the 'Additional Requirements' section of your quote	No further requirements shown	<input type="checkbox"/>	I have set out the details separately	<input type="checkbox"/>
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Section F – Scheme information

Is there a trust in place? Yes No

What is the full scheme name as it appears on the establishing deed?

What was the date the trust was executed? / /

Is this a registered scheme? Yes No

For registered schemes, what is the PSO/PSTR number applicable to the above deed?

Commencement date / /

Annual revision date each year (day/month) /

Commission rate %

Payment frequency: Monthly Annually

F1 Rates and costs

Lump sum unit rate (if applicable) ‰

Annual cost £

DISP unit rate (if applicable) %

Annual cost £

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G1 Scheme eligibility

If there are different benefits for different categories of employee, please supply clear eligibility definitions for each category. Please tick correct boxes.

Is the eligibility 'All employees'? If 'No', please specify the eligibility below.

Yes No

Lump sum (LS)

Death in Service Pension (DISP)

G2 Entry ages, service requirement and age at which cover ceases

Standard cease age is usually the normal expected retirement age. If cover is required beyond this please also complete the deferred retirement cover box (max 75).

	Minimum age to join scheme	Maximum age to join scheme	Minimum service requirement	Standard cease age	Deferred retirement cover cease age
Lump sum (LS)	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
DISP	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

Do employees join the scheme on the first day they meet the age and service requirements? If 'No', please specify below.

Yes No

Lump sum scheme joining date

DISP scheme joining date

If deferred retirement cover is required, please let us know further details as follows:

Deferred retirement cover is automatic for all members (select 'No' if discretionary)

Yes No

Deferred retirement cover is already in place (select 'No' if this is a new feature)

Yes No

A new retirement age has been agreed and documented with the employee(s)

Yes No

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G3 Pension scheme membership

	Lump sum		DISP	
Is the scheme only open to pension scheme members?	Yes <input type="checkbox"/>	No <input type="checkbox"/>	Yes <input type="checkbox"/>	No <input type="checkbox"/>
If 'No', are different benefits provided for pension scheme members?	Yes <input type="checkbox"/>	No <input type="checkbox"/>	Yes <input type="checkbox"/>	No <input type="checkbox"/>

If the answer to either of these questions is 'Yes', please enter the pension scheme name below.

Pension scheme name

Is the pension scheme eligibility and entry criteria the same as the eligibility in G1 and G2? Yes No
If 'No', please give the pension scheme eligibility and entry criteria below.

G4 Lump sum benefit basis

Please enter the benefit basis for example 4 x salary

G5 Death in service pension benefit basis

Please enter the benefit basis for example 25% of salary

Escalation rate

If LPI escalation what is the maximum (2.5% or 5%)?

Accrual rate (if DISP is a proportion of prospective pension)

Definition of prospective service (if accrual rate applies)

Pension payable to spouse or civil partner

Pension payable to any financial dependant

Pension continues to orphans

Separate children's pension

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G6 Salary definition

If the definition is basic salary please tick the relevant box, or complete the box below

Basic annual salary at the date of death

LS

DISP

Basic annual salary at the annual revision date

LS

DISP

Other (please specify)

Does salary sacrifice apply?

Yes

No

If 'Yes', please give details of the salary sacrifice arrangement on a separate sheet.

Does a salary cap apply? If 'Yes', enter cap amount

Salary cap amount

If 'Yes', is this cover already provided?

Yes

No

G7 Increases in temporary absence

Are benefits to increase in temporary absence
(in accordance with our policy provisions)?

Yes

No

Further information:

Please return the completed form by fax (0117 925 4490) or post prior to the commencement date, to our Bristol office below:

Our forms are available to download from our website: www.canadalife.co.uk/group

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GRP71 – 510R



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