RISK ASSURANCE MANAGEMENT

Group Life Assurance

Proposal Form for Excepted Group Life Assurance

PROPOSAL FORM
FOR EXCEPTED GROUP LIFE ASSURANCE

To: Risk Assurance Management Limited

We confirm that we wish to insure the Benefit of our Death-in-Service Scheme under an Excepted Policy as defined in Section 480 of the Income Tax (Trading and Other Income) Act 2005 to meet the conditions set out in Sections 481 and 482 of that Act.

Quotation Ref No:	**Dated:**

Name of Scheme:

Name of Principal Employer:

Address (including postal code):

Companies House Registration No:

Names of any Participating Employers:

Commencement Date:	**Anniversary Date:**

Address to which correspondence regarding this Contract is to be sent (including postal code):

Intermediary for this Contract:
Financial Services Registration No:

Data Protection

We understand that the use of any information provided by me for the operation of this insurance is for the process of underwriting, administration, claims management, handling customer concerns and the detection, prevention and investigation of fraud.

We understand that in order to do this the information may be shared with the underwriter (The Shepherds Friendly Society Limited), reinsurers, insurance intermediaries and service providers who are involved in either the operation of insurance which covers employees or the employee's benefits arrangements provided by the Company in accordance with their Data Privacy Notice shown on their website: www.ram-ltd.co.uk and the underwriter's Privacy Notice: www.shepherdsfriendly.co.uk/ privacy-policy

We understand the data will be processed fairly and securely and the details will be stored in line with UK Data Protection Law and will not be kept longer than necessary.

We confirm that the data in relation to this insurance has been obtained and passed to Risk Assurance Management Limited in accordance with the requirements of the General Data Protection Regulation.

Declaration

We hereby declare that the foregoing statements and details are correct and complete. We further confirm that the Contract will be subject to the provision of definitive membership data as applicable at the Commencement Date of the Contract and details of any other changes that have occurred between the date of the Quotation referred to and the Commencement Date.

We declare that we have made a fair presentation of the risk by disclosing all material facts*, or by providing Risk Assurance Management Limited with sufficient information to put them on notice to make further enquiry to reveal any material facts, in accordance with Section 3 of the Insurance Act (2015).

*A material fact in this context is a fact that is known, or ought to be known, by conducting a reasonable search for information and that would influence the decision on the terms and conditions (if any) of the insurance Risk Assurance Management Limited is prepared to offer. If you are unsure whether a fact is material or not you should disclose the full details.

For and on behalf of the Trustees:

This form must be signed by:

- if the Principal Employer or another Corporate Body are the Trustees, the duly authorised officers of that Company;

- if there are individual Trustees, each Trustee or by individuals who are authorised to sign for and on behalf of the Trustees.

We agree that a copy of this signed Declaration will be legally valid.

Signature: **……** **Full Name (please print):** **……** **Position:** **……** **Date: ……**	**Signature:** **……** **Full Name (please print):** **……** **Position:** **……** **Date: ……**

Please ensure all Trustees and authorised signatories sign above; additional signatories should use an Authorised Signatories form.

Please note that by not providing details of persons authorised to sign on behalf of the Trustees, claims settlement and/or amendments to the Policy may be delayed.

It is the responsibility of the Trustees to notify us if the authorised signatories change and failure to do so may delay claims settlement and/or amendments to the Policy.

Additional Authorised Signatories

This page should be used where there is not enough space provided above. It is essential to include the name and signature of each individual who may complete/sign forms and give instruction regarding this Scheme in the future.

Print Name:	**Signature:**	**Position:**
…….	…….	……
Print Name:	**Signature:**	**Position:**
……	…….	……
Print Name:	**Signature:**	**Position:**
……	…….	……
Print Name:	**Signature:**	**Position:**
……	…….	……

We hereby declare that the above named persons are authorised signatories on behalf of the Trustees of: ……

We agree that a copy of this signed document will be legally valid.

Print Name:	**Signature:**	**Position:**
……	…….	……

Date: ……

Risk Assurance Management Limited. Policies underwritten by The Shepherds Friendly Society Limited (FRN 109997)

Risk Assurance Management Limited is authorised and regulated by the Financial Conduct Authority (FRN 306891)

Registered Address:
23a Picton House, Hussar Court, Waterlooville, Hampshire PO7 7SQ
Registered in England and Wales No: 1334065

Chancery House, Leas Road,
Guildford, Surrey GU1 4QW
Tel: 0370 7200 780
Email: group.risk@ram-ltd.co.uk
Web: www.ram-ltd.co.uk

Managing General Agents' Association

GRID Group Risk Development