



**SECTION 2. SCHEME'S/TRUST'S BANK/BUILDING SOCIETY ACCOUNT DETAILS – PLEASE COMPLETE THIS SECTION**

Please provide the details of the scheme's/trust's bank/building society account in order that we can make any payments, either on your request or at the payment dates as stated in the terms and conditions, during and following the end of the fixed term.

Name of bank/building society \_\_\_\_\_

Address \_\_\_\_\_

Postcode \_\_\_\_\_

Name of account holder \_\_\_\_\_ Sort code 

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Roll number (if applicable) \_\_\_\_\_ Account number 

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**SECTION 3. THE INVESTMENT**

On behalf of the scheme/trust we wish to open an account for £  (minimum £3,000, no maximum).  
Please enclose a cheque made payable to Legal & General.

**SECTION 4. DECLARATIONS**

As the trustees, we confirm for and on behalf of the scheme/trust that:

- We are the current trustees of the scheme/trust and have all the necessary consents, powers and authorities to make this investment on the scheme's/trust's behalf.
- We have taken any and all advice required, do not require any further consent and will not be in breach of any regulatory or trust provisions in making this investment.
- We have received a copy of the brochure for the FTSE® Growth Plan 5.
- We agree to be bound to the terms and conditions of the FTSE® Growth Plan 5.
- The information given in this declaration is true and correct to the best of our knowledge and belief and we will inform Legal & General without delay of any change in the scheme's/trust's circumstances affecting any information in this form.
- We are applying for these securities on behalf of the scheme/trust and they are entitled to the securities in respect of which this Declaration is made.

We authorise Legal & General:

To hold the scheme's/trust's cash subscription, direct investments, interest and any other rights or proceeds in respect of those investments and any other cash.

**IMPORTANT, PLEASE READ: Data protection**

**Use of your information**

Legal & General takes your privacy very seriously. We use the personal information collected via this form and any other information that you provide to us ('your information') for the purposes of:

1. providing you with our products and services and dealing with your enquiries and requests,
2. administering your investment,
3. carrying out market research, statistical analysis and customer profiling, and
4. sending you marketing information (by post, telephone, email and SMS) about products and services of companies in the Legal & General group and of third parties whose products and services Legal & General offers to its customers.

By signing below, you agree to receive the information as described in 4 opposite, unless you tell us otherwise by ticking this box.   
Given the global nature of our business, we may need to transfer your information to countries outside the European Economic Area in order to provide our services to you.

**Disclosures:**

We will disclose your information to other companies within the Legal & General group of companies, regulatory bodies, law enforcement agencies, future owners of our business and suppliers we engage to process data on our behalf. If you have been dealing with a financial adviser, we will give them information about your product and, where appropriate, provide them with other information about your dealings with us to enable them to give you informed advice.

Where you have been introduced to us by a bank or a building society, we will share your information with them to enable them to:

- (a) carry out market research, statistical analysis and customer profiling, and
- (b) send you marketing information about their products and services and products and services of companies in the Legal & General group and of third parties whose products and services Legal & General offers to its customers.

By signing below, you agree to receive the information as described in (b) above by post or telephone, unless you tell us otherwise by writing to Legal & General Retail Investments, Customer Services, PO Box 1004, Cardiff CF24 0YS.

**Access:**

You have the right to ask for a copy of your information in return for payment of a small fee. To obtain a copy of your information, please write to us at the above address.

We agree to the use of the information as set out above.

We understand that a copy of the Terms and Conditions and completed application form is available on request.

We have read the FTSE® Growth Plan 5 brochure, Terms and Conditions and declaration carefully.

We agree that the Terms and Conditions form the basis of our agreement with Legal & General.

PLEASE SIGN BELOW (Please continue on a second sheet if necessary)

**First Trustee** Capacity

Signature

Name

Date

**Third Trustee** Capacity

Signature

Name

Date

**Second Trustee** Capacity

Signature

Name

Date

**Fourth Trustee** Capacity

Signature

Name

Date

Please send to your financial adviser or to: Legal & General Retail Investments, Customer Services, PO Box 1004, Cardiff CF24 0YS.

**FOR ADVISERS USE ONLY**

To meet Financial Services Authority regulatory reporting requirements, we must now record whether advice was given to your client regarding the sale of this product. Please tick the relevant box. Was advice given? Yes  No

If no advice was given, in accordance with Financial Services Authority regulations, this application needs an appropriateness assessment. Please confirm whether you have determined that the client has the necessary knowledge and experience in order to understand the risks of the product. Yes  No

**VERIFICATION OF IDENTITY (This is not applicable to Legal & General appointed representatives or employees)**

I confirm the Scheme/Trustee details listed in SECTION 1 were obtained by me. I have seen evidence to verify the identity of all applicants that meets or exceeds the standards set out within JMLSG guidance. Details of any evidence exceeding the guidance are attached.

Name \_\_\_\_\_

Job title \_\_\_\_\_

Signature

Date

