



Protection

Direct Debit details

Please complete and return this form to: Royal London, Waverley Gate, 2-4 Waterloo Place, Edinburgh, EH1 3EG.

You must complete this form if:

- the person, or people, paying for the plan is/are not the applicant(s); or
- more than one signature is required to authorise payments for the plan.

So that we can identify the plan when you return this form, please give us the full name of the person or people covered.

	Person 1	Person 2																												
Name																														
Postcode																														
Date of birth	D D M M Y Y Y Y	D D M M Y Y Y Y																												
Application number																														
What is the plan payer's relationship to the plan owner(s)? If you choose Employer, you must complete the information on page 2 regarding Beneficial Owners & Persons of Significant Control.	<table><tbody><tr><td>Wife</td><td>☐</td></tr><tr><td>Husband</td><td>☐</td></tr><tr><td>Partner / Co-habitant</td><td>☐</td></tr><tr><td>Common Law Spouse</td><td>☐</td></tr><tr><td>Parent</td><td>☐</td></tr><tr><td>Child</td><td>☐</td></tr><tr><td>Grandchild</td><td>☐</td></tr><tr><td>Grandparent</td><td>☐</td></tr><tr><td>Brother</td><td>☐</td></tr><tr><td>Sister</td><td>☐</td></tr><tr><td>Step Parent</td><td>☐</td></tr><tr><td>Business Partner</td><td>☐</td></tr><tr><td>Employer</td><td>☐</td></tr><tr><td>Other</td><td> </td></tr></tbody></table>		Wife	☐	Husband	☐	Partner / Co-habitant	☐	Common Law Spouse	☐	Parent	☐	Child	☐	Grandchild	☐	Grandparent	☐	Brother	☐	Sister	☐	Step Parent	☐	Business Partner	☐	Employer	☐	Other	
Wife	☐																													
Husband	☐																													
Partner / Co-habitant	☐																													
Common Law Spouse	☐																													
Parent	☐																													
Child	☐																													
Grandchild	☐																													
Grandparent	☐																													
Brother	☐																													
Sister	☐																													
Step Parent	☐																													
Business Partner	☐																													
Employer	☐																													
Other																														
If the payer is a 'company' or 'employer', please tell us the nature of the business.																														

Please give us the name of the individual or company who will be paying for the plan.

	If an individual is paying for this plan, we may need to verify their identity. So that we can do this, please give us their home address and date of birth.
First name(s)	
Surname	
Address	
Postcode	
Date of birth	

	If a company is paying for this plan, you must complete the information on page 2 regarding Beneficial Owners & Persons of Significant Control.
Company name	
Business Type	
Trading Address	
Postcode	

If the payer is a company, we'll need you to send us with this form a certified copy of the bank statement dated within the last 3 months.

As you've told us that the plan owner/payer on this application is a company we need you to provide the details of all Beneficial Owners and Persons of Significant Control (if not a Beneficial Owner) or key decision makers (if there are no beneficial owners or persons of significant control).

We require this information because we need to identify the individual(s) who is the ultimate beneficial owner of a corporate structure.

A Beneficial Owner is an individual who directly or indirectly owns a 25% or more share of the business.

If a beneficial owner is another company, we also require details of the individual beneficial owners of the owning company.

A Person of Significant Control is an individual who:

- directly or indirectly controls 25% or more of the voting rights,
- directly or indirectly has the right to appoint or remove the majority of directors, or
- has the right to otherwise exercise or actually exercises significant influence or control within the business.

A key decision maker is an individual who:

- has the right to make strategic decisions on how the company is run,
- is permitted to operate the company bank account and or finances.

For more detailed information on the above definitions, please see Companies House.

To protect our customers we may have to verify the identity of certain individuals connected to a policy. So that we can do this, please give us their home address and date of birth. We do this electronically to make things easier for you. If these individuals would prefer us not to do this electronically please call us on 0345 6094 500 so we can talk through what needs to be sent to us.

Additional Role 1

Title	Mr ☐ Mrs ☐ Miss ☐ Ms ☐
	Other (please give details)
First name(s)	
Surname	
Date of birth	D D M M Y Y Y Y
Address	

Additional role 2

Title	Mr ☐ Mrs ☐ Miss ☐ Ms ☐
	Other (please give details)
First name(s)	
Surname	
Date of birth	D D M M Y Y Y Y
Address	

Additional role 3

Title	Mr ☐ Mrs ☐ Miss ☐ Ms ☐
	Other (please give details)
First name(s)	
Surname	
Date of birth	D D M M Y Y Y Y
Address	

Additional role 4

Title	Mr ☐ Mrs ☐ Miss ☐ Ms ☐ Other (please give details)
First name(s)	
Surname	
Date of birth	D D M M Y Y Y Y
Address	
How would you, or the person paying for this plan, like to pay? Depending on the start date of your plan, the first payment may not be collected on the day you choose. We'll write to you at least 10 working days before we collect the first payment.	Monthly by Direct Debit ☐ We'll take payments from your account on the same day of the month as the start date of your plan. (e.g. 1st, 10th, etc). If you'd prefer to choose a different day of the month please tell us below. D D (between 1st and 28th inclusive)

To: The Manager	Bank/Building society
Address	
Postcode	

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[illegible]

Please pay Royal London Mutual Insurance Society Limited Direct Debits from the account detailed in this Instruction subject to the safeguards assured by the Direct Debit Guarantee. I understand that this Instruction may remain with Royal London Mutual Insurance Society Limited and, if so, details will be passed electronically to my bank/building society.

Date

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This Guarantee should be detached and retained by the payer.

- This Guarantee is offered by all banks and building societies that accept instructions to pay Direct Debits
- If there are any changes to the amount, date or frequency of your Direct Debit Royal London Mutual Insurance Society Limited will notify you three working days in advance of your account being debited or as otherwise agreed. If you request Royal London Mutual Insurance Society Limited to collect a payment, confirmation of the amount and date will be given to you at the time of the request
- If an error is made in the payment of your Direct Debit, by Royal London Mutual Insurance Society Limited or by your bank or building society, you are entitled to a full and immediate refund of the amount paid from your bank or building society
 - If you receive a refund you are not entitled to, you must pay it back when Royal London Mutual Insurance Society Limited asks you to
- You can cancel a Direct Debit at any time by simply contacting your bank or building society. Written confirmation may be required. Please also notify us.

To protect our customers we may have to verify the identity of certain individuals connected to a policy. We do this electronically to make things easier for you. If these individuals would prefer us not to do this electronically please call us on 0345 6094 500 so we can talk through what needs to be sent to us.



Royal London
royallondon.com

**We're happy to provide your documents in a different format, such as braille,
large print or audio, just ask us when you get in touch.**

The Royal London Mutual Insurance Society Limited is authorised by the Prudential Regulation Authority and regulated by the Financial Conduct Authority and the Prudential Regulation Authority. The firm is on the Financial Services Register, registration number 117672. It provides life assurance and pensions. Registered in England and Wales number 99064. Registered office: 80 Fenchurch Street, London, EC3M 4BY. Royal London Marketing Limited is authorised and regulated by the Financial Conduct Authority and introduces Royal London's customers to other insurance companies. The firm is on the Financial Services Register, registration number 302391. Registered in England and Wales number 4414137. Registered office: 80 Fenchurch Street, London, EC3M 4BY.