



If you have any questions  
please call us on 0800 776677



# Maturity payment request form

Payment reference:

If you need help completing this form, you can contact us on the number given. Please use the envelope provided or send your reply to us at: LV= County Gates, Bournemouth, BH1 2NF.

## Section 1 – Personal details

Please check that we have your details correctly recorded (please tick).

Yes

No  Please complete below

First name:

Surname:

Address:

Postcode:

If you've amended your name on this form we'll need to see original documentation to support this before we can proceed with your payment – for example an original birth, marriage or civil partnership certificate.

If we've any questions it would be quicker to contact you by phone and/or email, if you're happy for us to do this please provide us with your telephone number, including the local area code, and email address.

Home phone number:  Mobile number:

Email address:

## Section 2 – Policy details

Policy number:

Policy owner:

Maturity date:

Units held:  Bid price:  Current value\*

\*as at date of letter

The value given above is only a guide as to what the policy is worth and isn't a guaranteed amount. The final value of your policy will be calculated at maturity and payment will be sent to you shortly afterwards.

## Section 3 – For your information

Please remember that this plan gives you two options. You can choose to continue saving with us and extend the term for a further ten years. Or if you'd prefer we'll send a cheque payable to you for the maturity amount. Please allow up to ten working days from the maturity date to receive payment.

Please tell us overleaf what you'd like to do.

## Section 4 – Options

- 1)  Continue saving and extend the term of my Maximum Investment Plan by a further ten years. If you choose this option, this payment request form needs to be with us at least five days before the maturity date.
- 2)  Send me a cheque for the maturity amount.

**Please remember that you can also reinvest some of your proceeds, or continue saving on a regular basis. We've got some great options available for you. Please call us for details.**

## Section 5 – Your declaration

- 1) I agree that payment by LV= of benefits to myself as claimant named on this form, is in full and final discharge of all and any claim by me on the policy/policies.
- 2) I promise that I will repay LV= any money mistakenly or inadvertently paid to me or paid to me as a result of (and which a reasonable person would consider to be the probable result of) any untrue, misleading or inaccurate information carelessly or deliberately given by me, or on my behalf in respect of the policy/policies.
- 3) I promise that I will be responsible for all and any losses and/or expenses incurred by LV= which are as a result of (and which a reasonable person would consider to be the probable result of) any untrue, misleading or inaccurate information carelessly or deliberately given by me, or on my behalf in relation to the policy.
- 4) I confirm that the details of my claim and in this form are true and complete.

Signed (policy owner)  Date:  /  /

## Section 6 – Documents

**Please note:** We don't need your policy document to make your payment, unless the current value is over £100,000.00.

If you've any of the following documents, please send them to us. This will avoid any delay in paying the maturity money to you:

- Original deed of assignment
- Certified copy of Power of Attorney
- Certified copy of Trust Deed

## Section 7 – Helpful points

- **Is there an alternative way to receive my money?**  
Yes, we can pay the money by CHAPS, but there is a charge for this service.
- **What is a certified copy?**  
A Solicitor will have signed a copy of the document confirming that it is the same as the original.
- **Who do I contact if I have any questions or need any help?**  
We're happy to help. You can call our Heritage payment department on 0800 776677.  
For textphone dial 18001