



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:

Maturity value:

## Section 3 – Payment details

I would like the maturity amount paid as I have detailed below (Please tick).

**One**  Take the maturity value of £.....as a tax free cash lump sum.

**Two**  Take a gross annuity of £..... payable in half yearly instalments. The first payment is usually six months after your 60th birthday.

**Important** – The annuity payment will be paid to you gross and is subject to tax at your highest rate of income tax. You should tell HM Revenue & Customs about the annuity payments via your self assessment form.

Provided premiums have been paid by direct debit to maturity we'll make the lump sum payment by direct credit to your bank account. If we can't do this we'll send you a cheque. Please allow up to ten working days from the maturity date to receive payment.

**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 to you. Please call us for details.**

## Section 4 – 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 5 – 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 6 – 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