



If you have any questions
please call us on 0845 6405279



Surrender 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:	Date of entry:
Units:	Bid Price	Bonus:
Current surrender value:	Valuation date:	Please note this figure is not guaranteed

Section 3 – Payment details – please tell us what you'd like to do

I would like the surrender amount paid as I have detailed below (please tick)

A) Direct Credit – For payment to be paid to the bank details on our records, only if you've been paying your premiums by Direct Debit and they're up to date. If not, or you have a single premium policy, complete your bank details below and send original proof of account ownership (i.e. bank statement).

Account Name:

Sort Code: - - Account Number:

B) Cheque (payable to the policyholder)

C) Chaps (£25 Fee applies) Please complete bank details above and supply proof of account ownership

Once the payment is made we'll send you a statement showing a breakdown of how much we've paid.

Section 4 – Your declaration

1) I promise that I will repay LV= any money mistakenly or inadvertently paid to me for this withdrawal 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.

- 2) 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.
- 3) I confirm that the details of my claim and in this form are true and complete.

Print name and Sign
(policy owner)

Date:

/

/

Print name and Sign
(2nd policy owner)

Date:

/

/

A second signature is only needed if the policy is jointly owned.

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 money to you:

- Original proof of account ownership
- Original deed of assignment
- Certified copy of power of attorney
- Certified copy of trust deed

Section 6 – Helpful points

- **Can you pay a direct credit into my building society account?**
No, we can only pay into a bank account
- **What is a certified copy?**
A Solicitor will have signed a copy of the document confirming that it is the same as the original.
- **How long will I have to wait for the money to be paid to me?**
We aim to process all payments within five working days; however a further period of 5 working days may need to be added to account for the banking process. For RNPFN unit linked policies please allow an additional five working days for the unit pricing procedure to be completed.
- **I've been paying the premiums for this policy but I'm not the policy owner. Am I entitled to request a withdrawal (from the policy)?**
No, only the policy owner is entitled to request a withdrawal.
- **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 **0845 6405279**. For textphone dial 18001 first.

Note: if the original owner of the policy has died and we haven't been told, please send us the original death certificate (certified original copy received from the registrar).