

Build trust in three simple steps

As their trusted adviser, it's important you're advising clients to put their protection into trust.

Just by placing their policy into one, they can benefit from better control of their money, manage inheritance tax, faster payments and the ability to nominate exactly the beneficiaries they want. This can offer much-needed peace of mind and remind clients why you're their trusted source of solid advice.

We've made trusts easier

With our online process, setting up a trust is now even more straightforward than ever:

- Manage everything securely online in one easy-to-access place
- No more signatures, witnesses or paperwork
- Enhanced features for split trusts to offer more choice - such as how much terminal or critical illness to retain and how much to put into trust
- Greater freedom to exercise product options without trustee permission, such as declining indexation options.

How to get started



1. Choose to complete a trust

This section is available after the underwriting section.

2. Enter your client's details

Your clients will automatically be a trustee. Simply, fill in the name and address of at least one additional trustee and, where applicable, add the beneficiary's name.



3. Update the application

'Update' the application and enter a start date. The application is now live.

We'll take it from there

Once live, you don't need to do anything else. All records will be updated to show that the policy is in trust. Everything you need is in the Documents section of Agent Hub in OLPC. And your clients can see everything online under '**My Account**'.

For more information on online trusts, or to view our FAQs please visit: www.legalandgeneral.com/trusts