

Flexible Annuities New Business Illustration Request

The Gibraltar Financial Services Commission is the independent financial services regulator for Gibraltar. They require us, London & Colonial Assurance PCC Plc (LCA), to provide your client with a specific New Business Illustration for LCA's Flexible Annuities. Please complete this form as fully as possible and email to LCAillustrations@stmgroup.online.

The security and safety of your data and your client's data is very important to us. A copy of our Privacy Notice can be found on our website: <https://info.stmgroupplc.com/privacy-notice/>

If you have any questions, or need to discuss specific client requirements please call our Review Team on (UK): 0044 (0)2036 406843 (Gibraltar): 00350 200 42686.

Policy Type (please tick):	<input checked="" type="checkbox"/> Flexible Life Annuity (FLA)	<input type="checkbox"/> Flexible Pension Annuity (FPA)
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Client Name:

Client Date of Birth: Day Month Year

Premium Amount: £

LCA Initial Fee: %

LCA Annual Management Fee: %

Financial Adviser Initial Fee: %

Financial Adviser Annual Renewal Fee: %

Fund Charges: %

Income (please tick):

<input checked="" type="checkbox"/> Advance	<input type="checkbox"/> Arrears	<input type="checkbox"/> Monthly
<input type="checkbox"/> Annual	<input type="checkbox"/> Quarterly	<input type="checkbox"/> Bi-Annual

Name of Adviser Firm:

Does the Adviser Firm have TOB with LCA?

<input checked="" type="checkbox"/> Yes	<input type="checkbox"/> No*
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*If no, the Adviser Firm will need to register online by completing our online questionnaire before submitting new business. The online questionnaire is available here: <https://portal.stmgroupplc.com/adviser-registration>

Comments: