

Benenden Healthcare for Business Data Capture Form

This form should be used to collect all the information we need from your client to be able to issue an application to establish a group scheme.

Once you have collected all of the information laid out below, please return this form to **broker.support@benenden.co.uk**

A pre-populated Application Form and our Group Scheme Terms & Conditions will be sent directly to your client on your behalf, requesting them to review and sign the application electronically, using Docusign.

Once the Application Form has been signed and returned, and the application has been accepted by Benenden Health, we will then issue a Group Scheme Certificate, to confirm our acceptance of the application.

1. About the Organisation

Organisation name

Trading name (if different)

Registered number (for a PLC, Limited Company or LLP only. For other entities such as Sole Traders, Partnerships or other organisations please provide a copy of your letterhead or VAT registration with this Application Form)

Registered address (for a PLC, Limited Company or LLP only. For other entities such as Sole Traders, Partnerships or other organisations please provide a copy of your letterhead or VAT registration with this Application Form)

Postcode

Correspondence address (if different)

Postcode

Contact phone number

Industry (e.g. Foodstuffs Manufacturer, Charity or Professional Services)

2. About the Group Scheme (please select one for each field)

Group Scheme type (please tick one only)

Employee only

Employees and Dependants

Funding basis

Organisation

Partial

£ .

funded per participants

Voluntary

Payment frequency

Monthly

Quarterly

Annually

Payment method

BACS

Standing order

Direct Debit

3. About the Group Scheme (personal data)

Will other entities within the Organisation Group provide personal data to us?

Yes No

If Yes, please provide details below

Entity name

Registered address

Entity name

Registered address

4. Start Date

Group Schemes will always commence on the 1st of any month. Please provide the month in which your client would like the Group Scheme to be set up and we will aim to meet their requirements where possible

Preferred Group Scheme Start Date dd / mm / yyyy

5. Group Secretary details

Please provide the contact details of the person nominated by the Organisation as Group Secretary responsible to administer the Group Scheme

Title

Forename

Surname

Position held

Email address

Contact phone number

6. Scheme Administrator details

Please provide the contact details of the person nominated by the Organisation to manage the joiners and leavers

Title

Forename

Surname

Position held

Email address

Contact phone number

7. Finance/Accounts Administrator details

Please provide the contact details of the person(s) nominated by the Organisation to receive invoices and manage payments for the Group Scheme

Title

Forename

Surname

Position held

Email address

Contact phone number

Additional finance/accounts administrators can be set up once your client has received their Group Scheme Certificate by emailing broker.support@benenden.co.uk

8. Intermediary Details

Please provide your contact details as the authorised Intermediary appointed to act for and on behalf of the Organisation

Intermediary name

Contact Name

Email address

Contact phone number

Position held

Benenden Health is a trading name of The Benenden Healthcare Society Limited. Healthcare for Business is offered by The Benenden Healthcare Society Limited, which is an incorporated Friendly Society, registered under the Friendly Societies Act 1992, registered number 480F. The Society's contractual business (the provision of tuberculosis benefit) is authorised by the Prudential Regulation Authority and regulated by the Financial Conduct Authority and the Prudential Regulation Authority, (Financial Services Register number 205351). Verify our registration at register.fca.org.uk. The remainder of the Society's business is undertaken on a discretionary basis. Registered Office: Holgate Park Drive, York, YO26 4GG.

At Benenden Health, we look after your details carefully and we adhere to the requirements of the UK Data Protection Act 2018. We are keen to keep you informed about how we use your information and have a 'Privacy Notice' which makes clear, in one place, what these uses are. The Privacy Notice also provides you with information about your rights. Our Privacy Notice is available at benenden.co.uk/privacy-policy or can be requested by calling us. Changes to the Privacy Notice are made occasionally, so please revisit our website and read it through again from time to time.

Full details on all products are available by contacting Benenden Health on 0800 414 8020 or by emailing broker.support@benenden.co.uk. No personal recommendation has been given on the suitability of this product, if in doubt you should seek independent advice.

Please note that your call may be recorded for our mutual security as well as for training and quality purposes. Lines are open 9am – 5pm Monday to Friday (except Bank Holidays).