

# Who can sign a Letter of Authority?



## For Group Life Schemes

Including Spouse/Partner Life Assurance Schemes



Listed below are details of whom we can accept signatures or instruction concerning different aspects of the administration of the schemes, depending on who has been appointed trustee.

### For schemes with individuals as trustees:

- **Release of Information** - we can accept signatures/instruction from the following people:
  - Company Director/Secretary
  - The individual trustees themselves
  - HR Managers
  - Benefits and Reward Managers
  - HR Advisers
  - Senior Supply Chain Manager
  - Finance Manager
  - Head of Reward
  - People listed on a Policy Authorisation Form
  - For LLPs, Designated Member/Partner
  - Product Manager
  - Financial Controller
  - Compensation and Benefits Manager
  - Reward Manager
  - Payroll Manager
  - Legal Professional
  - Those in similar functions and of similar variation at the principal employer
- **Documentation, Change of Adviser, Changes to policy cover, Claims Forms** - Forms must be completed and signed or instruction received from an individual authorised to act for and on behalf of the Trustees. If individuals are trustees and the form is not signed by a Trustee, we will require further evidence of the authority held. This can take the form of a completed Policy Authorisation Form, board minutes, copy of a power of attorney or a company headed letter or email directly from a Trustee confirming they are authorised.

### For schemes with Company as Trustee or a Trust Company as Trustee:

- **Release of information, Change of Adviser and Changes to policy cover** – we can accept signatures/instruction from the following people:
  - Company Director or Secretary
  - For LLPs, Designated Member/Partner
  - HR Managers
  - Benefits and Reward Managers
  - HR Advisers
  - Senior Supply Chain Manager
  - Finance Manager
  - Head of Reward
  - People listed on a Policy Authorisation Form
  - Product Manager
  - Financial Controller
  - Compensation and Benefits Manager
  - Reward Manager
  - Payroll Manager
  - Legal Professional
  - Those in similar functions and of similar variation at the principal employer
- **Documentation and Claims Forms** - These must be completed and signed by an individual authorised to act for and on behalf of the Trustees. If the company/LLP or Trust Company is trustee and the form is not signed by a company Director or Designated Member, we require further evidence of the authority held. This can take the form of a completed Policy Authorisation Form, board minutes, copy of a power of attorney or a company headed letter or email directly from a Director/Designated Member confirming they are authorised.

## For schemes under the Aviva Group Life Master Trust:

- **Release of Information, Documentation, Change of Adviser, Changes to policy cover & Claims Forms -** we can accept signatures/advice from the following people:
  - Company Director or Secretary
  - For LLPs, Designated Member/Partner
  - HR Managers
  - Benefits and Reward Managers
  - HR Advisers
  - Senior Supply Chain Manager
  - Finance Manager
  - Head of Reward
  - People listed on a Policy Authorisation Form
  - Product Manager
  - Financial Controller
  - Compensation and Benefits Manager
  - Reward Manager
  - Payroll Manager
  - Legal Professional
  - Those in similar functions and of similar variation at the principal employer
- Forms must be completed and signed or instruction received from an individual authorised to act for and on behalf of the policyholder. If we do not feel someone of suitable authority has signed, we may seek further evidence of the authority held.

For more information, please contact your Account Manager  
or call us on **0800 145 5684**  
or email [groupprotectionalsupport@aviva.com](mailto:groupprotectionalsupport@aviva.com).