



GROUP SECRETARY APPLICATION FOR BUSINESS HEALTH PLANS

A COLLABORATION BETWEEN TWO OF THE MOST RESPECTED NAMES IN GLOBAL HEALTHCARE

Bupa Global is the sole insurer of this plan.

Bupa Global is a trade name of Bupa, the international health and care company. Bupa is an independent licensee of Blue Cross and Blue Shield Association. Bupa Global is not licensed by Blue Cross and Blue Shield Association to sell Bupa Global/Blue Cross Blue Shield Global co-branded products in Argentina, Canada, Costa Rica, Panama, Uruguay and US Virgin Islands. In Hong Kong, Bupa Global is only licensed to use the Blue Shield marks. Please consult your policy terms and conditions for coverage availability. Blue Cross and Blue Shield Association is a national federation of 36 independent, community-based and locally operated Blue Cross and Blue Shield companies. Blue Cross Blue Shield Global is a brand owned by Blue Cross and Blue Shield Association. For more information about Bupa Global, visit bupaglobalaccess.com, and for more information about Blue Cross and Blue Shield Association, visit www.BCBS.com.

IMPORTANT INFORMATION

You can type directly into this form, save it and email it to us. Alternatively, please write clearly in block capitals using black ink.

Once completed, send your form and any supporting documents to: brokereuro@bupa-intl.com, +44 (0) 1273 718 314

You can also send it by post to: Bupa Global, Victory House, Trafalgar Place, Brighton, BN1 4FY, United Kingdom.

Please only use one method, for example if you scan and email you do not need to fax or post.

This form should be returned along with completed member applications or membership census.

If you have any questions please contact your sales advisor or intermediary.

Bupa Global Business plans are for businesses/companies, their employees and employee's dependants.

A dependant is the principle member's partner, spouse or dependant children. A minimum number of three employees must be covered. For employees aged 65 and over and companies that consist solely of members of the same family, it must be fully substantiated that such employees are working for the same employer/company. Copies of payslips or employment contracts will need to be provided.

All material facts relating to the questions asked in this application must be disclosed. Failure to do so may invalidate the policy. A material fact is one which is likely to influence the decision of an insurer when assessing and accepting this application.

As the Sponsor of this company plan you must answer all questions and sign the declaration on behalf of the company and all persons to be insured.

We will not be able to process your application if this form is incomplete. Please be sure to check the entire form.

Guidance Notes have been written next to each section to be completed to help you understand the information we are requesting.

If you have any queries relating to any section please contact your sales advisor or intermediary if using one.

Start date

The start date will generally be the date on which your completed group application form is received and accepted by Bupa Global. If you require a different start date, for example to take into account the expiry of your current insurance held elsewhere, please complete the start date box in section 1. Bupa Global will not accept a transfer if more than 30 days has elapsed since the cancellation of your current insurance. Cover cannot start between the 28th & 31st of any month

Back dating cover

Bupa Global will only back date cover in exceptional circumstances such as, but not limited to:

- Taking into account the expiry date of your current insurance held. Bupa Global will not accept a transfer if more than 30 days has elapsed since the cancellation of your current insurance
- If any application has been confirmed as received by Bupa Global and since been misplaced in our offices
- For employees who are new joiners to your company have received an application form, but are eligible to join from their first date of employment.

A copy of their employment contract will be required with their application form

Underwriting terms and their requirements

Bupa Global offer three different underwriting terms. You should have agreed the underwriting terms with your sales advisor or intermediary before completing this form. If you have any doubts as to the agreed terms, please contact your sales advisor or intermediary before completing this form.

Intermediaries

You may have received advice from an intermediary. In certain jurisdictions, Bupa Global require your consent to make payment to your intermediary for their part in introducing you to us as a member. Where applicable, we will deduct a fee from each subscription payment received from you and pass this onto your intermediary on your behalf. For the avoidance of doubt, your consent to make payment of intermediary's fees does not affect the amount of any premiums payable by you, which would remain the same whether or not you had approached us directly or not. Upon renewal of your policy, we will continue to pay your intermediary until otherwise notified by you in writing.

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UNDERWRITING OPTIONS

The three underwriting terms available are:

Full Medical Underwriting (FMU)

All employees must complete individual employee applications. Unless a pre-existing condition or related condition is fully disclosed on our application form and we have not expressly excluded it, benefit will not be payable. Any specific exclusion(s) will be detailed on the insurance certificate issued in our member welcome pack.

Continued Personal Medical Exclusions (CPME)

Continued personal medical exclusions is where underwriting terms from your previous insurer are carried over to you Bupa Global Plan. In order to transfer your employees on a CPME basis from their previous insurer we require copies of their previous insurance certificate. CPME transfers are only available if your scheme is on a medically underwritten or moratorium underwritten basis. The certificate should be the last insurance certificate issued and confirm the following information: Employee's first and surname, their date of birth, gender and home address. The same information is required for any dependants. The certificate must confirm the medical exclusions (if any) that are applicable to each person or the commencement date of the previous moratorium.

Medical History Disregarded (MHD)

As the Sponsor of this company plan you must answer the health questions at the bottom of this section. All employees must join as soon as they are eligible. This also applies to new employees that are added after the start date of the group contract. Please include a full membership census (first name, surname, date of birth, gender, location, nationality, occupation and level of cover) of all eligible employees and dependants to be covered. Employees or dependants aged 70 and over are not eligible for MHD cover.

Please note that you can only choose one set of underwriting terms

FMU – Full medical underwriting A fully completed application form for each person to be covered under this plan must be submitted with this application	<input type="radio"/>
CPME – Continued personal medical exclusions Please complete the section below and provide a membership census along with their previous insurance certificates	<input type="radio"/>
MHD – Medical history disregarded Please complete the section below and provide a membership census	<input type="radio"/>

If applying for CPME or MHD, these terms must be agreed by our underwriters prior to acceptance if any of the questions are answered 'yes'.

Note: This also applies to future additions to your plan if MHD is selected.

Are you aware if any person to be covered under the policy has a history of the following:		If yes, how many of your employees
Heart conditions or strokes?	<input type="radio"/> Y <input type="radio"/> N	
Any type of cancer, including benign brain tumours?	<input type="radio"/> Y <input type="radio"/> N	
Are you aware of any employee or dependant who has any ongoing or planned in-patient treatment?	<input type="radio"/> Y <input type="radio"/> N	

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ADMINISTRATION & DOCUMENTS

All group documents will be addressed to the Group Secretary.

GROUP DOCUMENTS: Such as your contract and billing, including invoices, statements and credit notes.

- Group Secretary
 e-docs
 post
 both
 Intermediary
 n/a
 post
 n/a

Please note group documents can only be sent to one recipient, either the group secretary or intermediary.

MEMBERSHIP DOCUMENTS: Membership documents can only be posted directly to your employees if we have their full address details. For access to e-docs they must have registered to use MembersWorld; our online secure website which gives your employees access to key membership information like their claims history.

- Group Secretary
 n/a
 post
 n/a
 Intermediary
 n/a
 post
 n/a
 Member
 e-docs
 post
 both

Please note membership documents can only be sent to one recipient, either the group secretary, the intermediary or the member.

We are committed to protecting your privacy when dealing with your personal information. This privacy notice provides an overview of the information we collect about you and how we use and protect it. It also provides information about your rights. The information we process about you, and our reasons for processing it, depends on the products and services you use. You can find more details in our full privacy notice available at: www.bupaglobal.com/privacypolicy. If you do not have access to the internet and would like a paper copy of the full privacy notice, please contact the Bupa Global service team on +44 (0)1273 323 563. Alternatively you can email or write to the team via info@bupaglobal.com or Bupa Global, Victory House, Trafalgar Place, Brighton BN1 4FY, United Kingdom. If you have any questions about how we handle your information, please contact us at info@bupaglobal.com

Information about Bupa Global

In this privacy notice, references to “we” or “us” or “our” are to Bupa Global. For company contact details, visit www.bupaglobal.com/legal-notices

1. Scope of our privacy notice

This privacy notice applies to anyone who interacts with us in relation to our products and services (“you”, “your”), in any way (for example email, website, telephone, app).

2. Ways in which we obtain personal information

We collect personal information from you and from certain third parties (for example those acting on your behalf, like brokers, healthcare providers and so on). If you give us information about other people, you must make sure that they have seen a copy of this privacy notice and are comfortable with you giving us their information.

3. Categories of personal information

We process the following categories of personal information about you and, if it applies, your dependants. This is standard personal information (for example information we use to contact you, identify you or manage our relationship with you), special categories of information (for example health information, information about race, ethnic origin and religion that allows us to tailor your care), and information about any criminal convictions and offences (we may get this information when carrying out anti-fraud or anti-money-laundering checks or other background screening activity).

4. Purposes and lawful grounds of our processing personal information

We process your personal information for the purposes set out in our full privacy notice, including to deal with our relationship with you (including for claims and complaints handling), for research and analysis, to monitor our expectations of performance (including of health providers relevant to you) and to protect our rights, property, or safety, or that of our customers, or others. The legal reason we process personal information depends on what category of personal information we process. We normally process standard personal information on the basis that it is necessary so we can perform a contract, for our or others’ legitimate interests or it is needed or allowed by applicable law. We process special categories of information because it is necessary for an insurance purpose, because we have your permission or as described in our full privacy notice. We may process information about your criminal convictions and offences (if any) if this is necessary to prevent or detect a crime.

5. Marketing and preferences

We would, on occasion, like to keep you informed of our products and services which we consider may be of interest to you.

- Please tick if you would like us and other members of the Bupa group to keep you updated about our products and services by post, telephone email and text.

You will be able to opt out of receiving these communications at any time by emailing info@bupaglobal.com or by writing to Bupa Global, Victory House, Trafalgar Place, Brighton BN1 4FY, United Kingdom.

6. Processing for Profiling and Automated Decision Making

Like many businesses, we sometimes use automation to provide you with a quicker, better, more consistent and fair service, as well as with marketing information we think will be of interest (including discounts on

our products and services). This may involve evaluating information about you and, in limited cases, using technology to provide you with automatic responses or decisions. You can read more about this in our full privacy notice. You have the right to object to direct marketing and profiling relating to direct marketing. You may also have rights to object to other types of profiling and automated decision-making.

7. Sharing your information

We share your information within the Bupa Group, with relevant policyholders (including your employer if you are covered under a group scheme), with funders who arrange services on your behalf, those acting on your behalf (for example brokers and other intermediaries) and with others who help us provide services to you (for example healthcare providers) or who we need information from to handle or check claims or entitlements (for example professional associations). We also share your information in accordance with the law. You can read more about what information may be shared in what circumstances in our full privacy notice.

8. Transfers outside of the UK and the European Economic Area (EEA)

We deal with many international organisations and use global information systems. As a result, we transfer your personal information to countries outside of the UK and the EEA (the EU member states and Norway, Liechtenstein and Iceland), for the purposes set out in this privacy notice.

9. How long we keep your personal information

We keep your personal information in line with periods using the criteria shown in the full privacy notice available on our website.

10. Your rights

You have rights to have access to your information and to ask us to correct, erase and restrict use of your information. You also have rights to object to your information being used, to ask us to transfer information you have made available to us, to withdraw your permission for us to use your information and to ask us not to make automated decisions which produce legal effects concerning you or significantly affect you. Please contact us if you would like to exercise any of your rights.

11. Data Protection Contacts

If you have any questions, comments, complaints or suggestions about this notice, or any other concerns about the way in which we process information about you, please contact us at info@bupaglobal.com. You can also use this address to contact our Data Protection Officer.

We are regulated by the Information Commissioner’s Office (www.ico.org.uk) who can be contacted at, Wycliffe House, Water Lane, Wilmslow, Cheshire SK9 5AF, United Kingdom. Tel: 0303 123 1113 (local rate) or 01625 545 745 (national rate). You have a right to make a complaint to them or to your local privacy supervisory authority.

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