

Group Life Assurance Scheme Claim Form

Please complete this form when a member has died while in your Group Life Insurance Scheme.

Important note: Please ensure that all the questions are fully answered prior to returning the completed form to Lutine Assurance Services Limited. The Company relies on the answers you give in processing your claim and cannot process your claim without all the questions being answered. Any omission or misleading information could delay or jeopardise payment of your claim.

(Please complete in BLOCK CAPITALS)

Group policy number : Scheme name :

Title : Mr/Mrs/Miss/Ms/Dr/other:

Deceased's name in full :

Date of birth : Date of death :

Job title :

Date member joined company : Date member joined the scheme :

If the above dates differ, please explain the reason for the delay and whether the member joined the scheme at their first opportunity :
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Membership category at date of death (as per the policy certificate at date of death) :

Date of entry into category :

Date the deceased was last actively at work :

Reason for any absence between date last actively at work and date of death :
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.....

Was the member on your payroll at the date of death?

If no, please give the reason for, and date of, the termination of employment :
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.....
.....

Cause of Death :

Did the death occur outside the UK? :

If yes, please confirm the following -

Date of departure from the UK :

Intended date of return to the UK :

Country visited :

Purpose of visit (eg business, holiday) :

Please ensure that the original death certificate is provided along with an official translation in cases where a UK death certificate has not been issued

Is the original death certificate enclosed? :

If not, please confirm why :

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We will need to see the original death certificate before settlement can be made, this will be sent back by return using recorded delivery.

Due to HMSO directives relating to copyright, we are unable to accept photocopies. It should also be noted that having sight of the original documentation also reduces the risk of fraud.

Life Assurance Benefit claimed

The benefit claimed should be that payable in accordance with the contract of insurance. You should ensure that the deceased was eligible and that, where earnings related, the benefit claimed is calculated in accordance with the scheme rules.

Scheme salary at date of deceased's last attendance at work : £

Scheme salary at date of death : £

Benefit calculation (eg 3 x salary, flat benefit) :

Amount of benefit being claimed : £

How will benefits be paid?

If your claim is accepted, our settlement of any lump sum benefit will normally be remitted by Electronic Fund Transfer, in the name of the trustees of the scheme, direct into the trustee bank account. Payments will not be made to parties other than the trustees of the scheme.

Trustees bank account details

Name of bank

Branch

Trustees account name

Trustees of

Bank Sort Code

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Account Number

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Declaration

To be completed by the trustees or authorised signatories of the scheme.

We, the Trustees of the Group Policy, hereby apply for payment of the benefit described above. We declare that the deceased member was a member of the scheme on the date of death and that the information contained in this form is accurate and complete to the best of our knowledge and belief. We agree that the payment of a benefit in accordance with our instructions above will constitute a full discharge of the liability of Lutine Assurance Services Limited under the policy in respect of that benefit.

Signature

Print Name Date

Capacity of signatory (This signature must be a Trustee or authorised Signatory)

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Checklist

- Claim form fully completed
- Trustee bank account details provided
- Original death certificate
- Original marriage certificate (if applicable)
- Evidence of earnings
- Declaration signed

We reserve the right to request additional information in order to assess the validity of the claim.

Please send this form and the listed information above to

Lutine Assurance Services Limited, 3rd Floor, 154 Great Charles Street, Birmingham, B3 3HN