

Death Claim Requirements (Individual Life Insurance)

Purpose of this checklist:

This checklist serves as a guide when filing a claim.

IMPORTANT REMINDERS

Please take note of the following:

- Submit certified true copies only.
 - ☑ Photocopies, except for IDs, are not acceptable.
 - ☑ Photocopies of IDs may be submitted provided the original copies are presented for verification.
- Except as indicated below, documents submitted to Sun Life Grepa Financial, Inc. (SLGFI), a joint venture of Sun Life and the Yuchengco Group of Companies, will not be returned.
- Always attach a photocopy of the Claimant's valid ID (any government-issued ID with photo and signature) with the basic claim requirements.
- We may ask for additional documents after reviewing the requirements you submitted.
- Death that occurs within two (2) years from date of policy issue or last reinstatement is subject to investigation and will affect processing time.

A Basic Claim Requirements

<input type="checkbox"/> Claimant's Statement [form provided by SLGFI] to be completed by designated primary beneficiary (-ies) or by authorized signatory, if beneficiary is a company <i>Special Instruction: One Claimant's Statement per beneficiary</i>	<input type="checkbox"/> Death Certificate duly certified by the Local Civil Registrar, signed with official seal and Local Civil Registry Number (<i>original form with blue background or lines is not acceptable</i>) <input type="checkbox"/> Original Policy Contract including Endorsement
--	---

B Conditional Requirements (*Submit appropriate requirements as indicated below.*)

B.1 Based on Beneficiary Information

If beneficiary is the spouse <input type="checkbox"/> Marriage Certificate issued by the Philippine Statistics Authority (<i>original</i>)	If beneficiary is a minor (<i>below 18 years old</i>) <input type="checkbox"/> Birth Certificate of the minor issued by the Philippine Statistics Authority (<i>original</i>) <input type="checkbox"/> Notarized Affidavit of Guardianship [form provided by SLGFI] if parent or other party is claiming on behalf of the minor Additional documents required if the approved claim exceeds PHP500,000.00: <input type="checkbox"/> Guardian's Bond approved by the court including the Summary of the Proceedings or the Petition if parent is claiming on behalf of the minor (<i>submit only upon approval of claim</i>) <input type="checkbox"/> Letters of Guardianship approved by the court including the Summary of the Proceedings or the Petition if party other than parent is claiming on behalf of the minor (<i>submit only upon approval of claim</i>)
If designated beneficiary is a creditor <input type="checkbox"/> Statement of Account if loan has not been paid in full as of date of death <input type="checkbox"/> Proof of Settlement of Loan if loan has been paid in full as of date of death	If beneficiary is a corporation <input type="checkbox"/> Corporate Secretary's Certificate indicating the name(-s), scope of authority and specimen signature(-s) of the person(-s) authorized by the company to sign the claim requirements <input type="checkbox"/> One (1) valid ID (<i>any government-issued ID with photo and signature</i>) per authorized signatory <input type="checkbox"/> Latest General Information Sheet (GIS) duly filed with the Securities and Exchange Commission (SEC)



B Conditional Requirements *(continuation)*

B.2 Based on Circumstances of Death

If death is due to an accident or violent incident

- Police Report**
- Autopsy and/or Medico-Legal Report** *(if available)*
- Toxicology Report** *(if available)*
- Obituary or Newspaper Clippings** *(if available)*
- Hospital Records of the life insured** *(Admitting History and Discharge Summary or their equivalent)*
- Driver's License** if accident occurred while insured was driving a vehicle
- Authorization to Investigate** [form provided by SLOCPI]

If death happened abroad

- Passport** *(original - to be returned)*
- Death Certificate and other documents related to travel or death abroad** *(e.g. Cremation / Embalming Certificate, Proof of Transfer of Body, etc.)* apostilled or authenticated by the applicable Consulate including the official English translation *(original - to be returned)*

If death occurred within two (2) years from date of policy issue or last reinstatement

- Attending Physician's Statement** [form provided by SLOCPI] to be completed by the doctor who attended to the insured during his last illness or at the time of death
- Authorization to Investigate** [form provided by SLOCPI]
- Hospital Records of the life insured** *(Admitting History and Discharge Summary or their equivalent)*

C Regulatory Requirements

If beneficiary is a corporation, or an individual who is a U.S. Person or tax resident *(including a green card holder and dual citizen)*, or who has a U.S. Address or U.S. phone number

- FATCA Declaration Form** [form provided by SLGFI]
- Duly accomplished **W-8BEN** or **W-9** [form may be downloaded from the IRS website - www.irs.gov/forms-instructions]

For inquiries and concerns, please contact us at any of the following:

Email: wecare@sunlifegrepa.com

Client Care: (+632) 8849-9633*

Toll-free (using PLDT Line): 1-800-10-SLGREPA (7547372) outside Metro Manila

8:00 AM - 7:00 PM | Mondays - Fridays

*Calls outside the Philippines may incur international call charges.

