

## REQUIREMENTS FOR LIFE CLAIMS CREDIT LIFE (CL) AND MORTGAGE REDEMPTION INSURANCE (MRI)

### STANDARD REQUIREMENTS

1. Original Sun Life Grepa Financial Inc (SLGFI) **Claimant's Statement** Death Benefit Form to be accomplished by the beneficiary who is 18 years old or above; if below 18, by the guardian (*Forms available in FORMS DOWNLOAD*)
2. Original PSA Copy or Original Certified True Copy of Death Certificate with seal and issued by the Local Civil Registrar
3. Photocopy of Birth Certificate of insured. Any one of the substitute Documents in the absence of Birth Certificate (photocopy):
  - 3.1. Baptismal Certificate
  - 3.2. Government Issued IDs
  - 3.3. Marriage Contract
  - 3.4. Voter's Registration Record
  - 3.5. Birth Certificate of Children
  - 3.6. Other public documents with date of birth of insured
4. Photocopy Government issued IDs of insured
5. Photocopy of Loan Ledger certified as correct by an authorized officer
6. Supporting documents if with beneficiary share :

Beneficiary	Requirement/s
Legal Spouse	<ul style="list-style-type: none"> <li>• Marriage Contract (Certified true copy is required for Sum Assured above Php 500,000)</li> </ul>
Children/Siblings of legal age	<ul style="list-style-type: none"> <li>• Photocopy of Birth Certificate</li> </ul>
Children/siblings below 18 years old: The father must represent the minor; in his absence or incapacity, to the mother	<ul style="list-style-type: none"> <li>• Photocopy of Birth Certificate of minor beneficiary</li> </ul>
Children/siblings below 18 (orphaned)	<ul style="list-style-type: none"> <li>• Certified True Copy of the Death Certificate of parents</li> <li>• Original Affidavit of Guardianship with Undertaking (Format to be provided by Sun Life Grepa Financial Inc.). <i>(Forms available in FORMS DOWNLOAD)</i></li> </ul>
Children/siblings below 18 years old and insurance benefit is above Php 500,000	<ul style="list-style-type: none"> <li>• Certified True Copy of Court approved guardianship bond (to provide upon approval of claim)</li> </ul>

### ADDITIONAL DOCUMENTS FOR CONTESTABLE CLAIMS (less than 1 year coverage)

1. Original copy Original copy Sun Life Grepa Financial Inc (SLGFI) Attending Physician's Statement Form. (*Forms available in FORMS DOWNLOAD*)
2. Certified True Copy Complete Medical Records (admitting history, Clinic/OPD records)
3. SLGFI Authorization Form & government issued IDs of beneficiary. (*Forms available in FORMS DOWNLOAD*)
4. Certified True Copy Police Report (if cause of death is due to accident/violent death)

### OTHER DOCUMENTS (ONLY IF APPLICABLE)

Requirements	Particulars	Remarks
Original copy of Affidavit of Discrepancy	With Discrepancy in Name	Waived for cases with minor discrepancy only and identity of insured/beneficiary was established from the submitted supporting documents (birth certificate, marriage contract etc)
Original copy of Affidavit of Extrajudicial Settlement	<ul style="list-style-type: none"> <li>• If no designated beneficiary and beneficiary based on hierarchy are children and siblings</li> <li>• If the designated beneficiary is void under the law</li> </ul>	For sum assured Php 100,000 and above, to require Affidavit of Publication from the Publisher of the newspaper
Original copy CENOMAR	As proof that insured and beneficiary have no record of marriage	
Original copy Affidavit of Waiver (Format to be provided by SLGFI). <i>(Forms available in FORMS DOWNLOAD)</i>	If the beneficiary wishes to waive his/her benefit to another person	Must be supported by two government issued IDs of the beneficiary
Original Death Certificate duly authenticated by Phil Consul	If died abroad	SLGFI will return the original copy to the claimant

### IMPORTANT REMINDER

The Company reserves the right to ask for additional requirements if the above-mentioned standard requirements are deemed insufficient in rendering fair and correct judgment on the claim