Sun Life GREPA Financial

Attending Physician's Statement (Disability)

Please **PRINT** clearly.

Please answer all questions in full.

In this form, *you* and *your* refer to the person insured, the patient, and the physician while *we, us, our* and *the Company* refer to Sun Life Grepa Financial, Inc., a joint venture of Sun Life Financial and the Yuchengco Group of Companies.

The patient is responsible for the completion of this form without expense to the Company.

The purpose of this report is to assist us in making a disability determination. In filling out this report, please include sufficient details of history, physical, and diagnostic findings, clinical course, therapy and response to enable us to make this determination.

1 General Information (to be completed by the patient)

Relating to the Life Insured / Patient

Life Insured (Last Name, First Name, M.I.) ☐ Male ☐ Female			Date of Birth (Month / Day / Year)
Complete Address			Policy Number(s)
Home Phone	Business Phone	Cellphone	Email Address
Policyowner (Last Name, First Name, M.I.) (Please complete if policyowner is other than the life insured)			Date of Birth (Month / Day / Year)

Authorization You hereby authorize the physician named below to release the information requested on this form for the purpose of claim processing. Likewise, you authorize that the information be released to any consulting physician retained by the Company.	**Signature of Patient (or Parent, if minor)**	Printed Name of Patient / Parent Date of Signing (Month / Day / Year)

2 Physician's Statement (to be completed by the Attending Physician)

I. History

When did symptoms first appear or when did accident happen? (Month / Day / Year)	When did patient cease work because of incapacity? (Month / Day / Year)

Did patient previously have the same or similar conditions? ☐ Yes ☐ No
If "YES", please state when and describe the conditions.

If condition is long standing, how would you describe its evolution since onset?
☐ Improved ☐ Remained the Same ☐ Slight Deterioration ☐ Significant Deterioration

Is condition due to injury or sickness arising from patient's employment?
☐ Yes ☐ No ☐ Unknown

Smoking Habits Question

Does the patient smoke cigarettes/cigarillos/cigars or consume any other tobacco product?..... ☐ Yes ☐ No

a) If "Yes", fill out appropriate box with number per day

cigarettes	cigars	tobacco	chewing tobacco	other tobacco used

b) If "No", has patient ever smoked a cigarette/ cigarillo/ cigar or consumed any other tobacco product in the past?..... ☐ Yes ☐ No

If "Yes", when did the insured stop smoking? month / year

Other Attending Physicians

Name of Physician	Address

2 Physician's Statement (to be completed by the Attending Physician) - continued

II. Diagnosis (including any complications and stage of illness)

Subjective Symptoms

Objective Findings (Please attach current x-rays, EKG, laboratory tests and any other clinical findings)

III. Dates of Treatment

Date of first Visit (Month / Day / Year)	Date of Latest Visit (Month / Day / Year)
Frequency of Visits ☐ Weekly ☐ Monthly ☐ Others (please specify)	

IV. Nature of Treatment

Please include surgery and medications prescribed, if any. If chemotherapy / radiotherapy, please indicate dates & number of sessions.

V. Progress

Has patient: ☐ Recovered	☐ Improved	☐ Remained Unchanged	☐ Retrogressed
Is patient: ☐ Ambulatory	☐ House Confined	☐ Bed Confined	☐ Hospital Confined
Has patient been hospital confined? ☐ Yes ☐ No		If yes, please provide name and address of hospital	
Date Admitted (Month / Day / Year)		Date Discharged (Month / Day / Year)	

VI. Cardiac (If Applicable)

Functional Capacity (American Heart Association) ☐ Class 1 (No Limitation)	☐ Class 2 (Slight Limitation)	☐ Class 3 (Marked Limitation)	☐ Class 4 (Complete Limitation)
Blood Pressure (Last Visit)	Systolic	Diastolic	

VII. Physical Impairment

- ☐ Class 1 - No limitation of functional capacity, capable of physical activity (1-10%)
- ☐ Class 2 - Slight limitation of functional capacity, capable of light manual activity (15-30%)
- ☐ Class 3 - Moderate limitation of functional capacity, capable of clerical / administrative (sedentary) activity (35-55%)
- ☐ Class 4 - Marked limitation (60-70%)
- ☐ Class 5 - Severe limitation of functional capacity, incapable of minimal (sedentary) activity (75-100%)

Is the patient capable of performing activities of daily living (bathing, dressing up, eating, getting in /out of bed, etc.)? ☐ Yes ☐ No

Remarks

VIII. Mental / Nervous Impairment

- ☐ Class 1 - Patient is able to function under stress and engage in interpersonal relations (no limitations)
- ☐ Class 2 - Patient is able to function in most situations and engage in most interpersonal relations (slight limitations)
- ☐ Class 3 - Patient is able to engage in only limited stress situations and engage in only limited interpersonal relations (moderate limitations)
- ☐ Class 4 - Patient is unable to engage in stress situations or engage in interpersonal relations (marked limitations)
- ☐ Class 5 - Patient has significant loss of psychological, physiological, personal and social adjustment (severe limitation)

Remarks

2 Physician's Statement (to be completed by the Attending Physician) - continued

IX. Neurological Deficits (If Applicable)

Functional Deficit

Involved Area

Severity: ☐ Very Mild ☐ Mild ☐ Moderate ☐ Severe

To what extent has recovery occurred neurologically? Functionally?
☐ 0% ☐ 20% ☐ 40% ☐ 60% ☐ 100% ☐ Others

Please detail the changes and / or limitations caused by the patient's illness

A. Paralysis / Paresis

B. Speech

C. Sensory

D. Neuro-psychological

Do you consider the neurological deficits to remain during patient's lifetime? ☐ Yes ☐ No

If "NO", what type of work would patient be capable of performing after recuperation?

☐ Own occupation prior to disability
☐ Other occupation, please specify: _____

X. Prognosis

IS PATIENT CURRENTLY ABLE TO RESUME WORK? (please check appropriate box)

☐ **Yes**

- If yes, ☐ On own occupation prior to diability?
  ☐ On other occupation?
- Since when? (Month / Year) _____

☐ **No**

- If no, when do you expect patient to recover to resume work? (Month / Year) _____
- Can patient resume own occupation prior to disability? ☐ Yes ☐ No
- If no, what type of occupation can patient perform? Why?

_____

_____

Other Comments / Remarks

3 Physician's Signature

Signature of Attending Physician X		Printed Name
PTR No.	License No.	Field of Specialization
Clinic Address		Clinic Hours / Schedule
Telephone No.		E-mail Address
Place of Signing		Date of Signing (Month / Day / Year)