

## Claim Form – Life Insurance Plan

IMPORTANT: "Statement of Claimant" must be completed in all cases. If there are two or more beneficiaries or other claimants, each beneficiary must complete a "Statement of Claimant". Each beneficiary must make a separate statement.

### Statement of Claimant

POLICY NUMBER(S): \_\_\_\_\_

#### 1 Decedent Information – (Please print in ink or type)

|                            |                |        |                 |       |     |
|----------------------------|----------------|--------|-----------------|-------|-----|
| Name                       | First          | Middle | Last            |       |     |
| Residence at time of death | Street         |        | City            | State | Zip |
| Date of Birth              | Place of Death |        |                 |       |     |
| Date of Death              | Cause of Death |        | Manner of Death |       |     |

#### 2 Beneficiary or Claimant Information

|               |                    |        |                          |                                      |     |
|---------------|--------------------|--------|--------------------------|--------------------------------------|-----|
| Name          | First              | Middle | Last                     | Social Security Number/Tax ID Number |     |
| Residence     | Street             |        | City                     | State                                | Zip |
| Date of Birth | Day Time Telephone |        | Relationship to Deceased |                                      |     |

Are you subject to back-up withholding? (Has the IRS contacted you directly to inform you that you are subject to back-up withholding?)  
 Yes       No

In what capacity or title do you Claim this Insurance? Check one:

- Beneficiary       Assignee       Trustee       Executor / Administrator       Guardian
- Other

#### 3 Statement of Lost Policy (Complete only if policy is unavailable for return)

I am unable to locate the original life insurance policy. I agree to return the policy to the company if found.

**4** Payment of Fund – Please Select One

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Single Sum Payment (Check)

Installment Payments (Please refer to the policy for options. If policy is not available, please contact our office.)

Installment Option Elected \_\_\_\_\_

Payment Frequency:  Monthly  Quarterly  Semi-Annually  Annually

**5** Signatures

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The undersigned hereby makes claim to said insurance (or contractual portion thereof, if more than one claimant) and agrees that the furnishing of this form or any of the forms supplemental thereto by the Company shall not constitute nor be considered an admission by it that there was any insurance in force on the life in question nor a waiver of any of its rights or defenses.

**Fraud Statement: A person who knowingly and with intent to defraud an insurer files a statement of claim containing any false, incomplete, or misleading information commits a felony.**

**Information Authorization**

Any physician, medical practitioner, hospital, clinic or other medically related facility, insurance company, the Medical Information Bureau or other organization, institution or person, that has any records or knowledge about the insured is hereby authorized to disclose any such information. A photographic copy of this authorization shall be as valid as the original. (This information will only be obtained for contestable claims.)

“Under the penalties of perjury, I certify that the information supplied on this form is true, correct and complete.”

\_\_\_\_\_  
Claimant Signature Date

\_\_\_\_\_  
Please Print Name

**Notary**

State of \_\_\_\_\_

County of \_\_\_\_\_ }SS.

Date: \_\_\_\_\_ personally appeared before me at \_\_\_\_\_

State of \_\_\_\_\_ the above Claimant, who is known to me and who subscribed the foregoing statement before me and stated under oath that the statements and answers above made and subscribed are true and full.

In Witness Whereof, I have hereunto subscribed my name and affixed my official seal.

(Seal)

My Commission Expires: \_\_\_\_\_

Notary Public