

## Partners of employees claim form for lump sum death benefits

Completion of all relevant fields will ensure  
prompt assessment of the claim

Life Claims Team  
Canada Life Limited  
3 Rivergate  
Temple Quay  
Bristol  
BS1 6ER

Tel: 0117 916 4460  
Fax: 01707 671180  
Email: [Grouplifeclaims@canadalife.co.uk](mailto:Grouplifeclaims@canadalife.co.uk)



# Group Life Assurance

Important information – please read prior to completion of Claim form

## When should a trustee/authorised signatory submit a claim form?

As soon as possible after the death of the partner of an employee.

**We will not pay any benefit, or any additional amounts of benefit, if a completed claim form in respect of the benefit being claimed, has not been received by us within two years of the date of death of the partner of an employee.**

## How to submit a claim?

If you wish to make a claim, we will initially need:

- an original death certificate
- a fully completed original claim form signed by the scheme trustees, or other agreed signatories

Section 1	Section 2	Section 3	Section 4	Section 5	Section 6	Section 7	Section 8
✓	✓	✓	✓	if applicable	✓	✓	✓

Where lump sum death benefits are based on an employee's salary we may also require evidence of a member's earnings where individual scheme data has not been provided at the commencement of risk or subsequently at the commencement of the current rate guarantee period (evidence can be copies of a member's last three full pay slips, a member's P60 for the last tax year or a P14).

Original certificates will be returned to sender by recorded delivery as efficiently as possible.

## Why does Canada Life require original certificates?

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.

## How long will it take to process my claim?

Once we have received all our initial requirements, we will advise you within five working days:

- of any further information we require to assess the validity of the claim, or
- if we are unable to admit the claim and the reason(s) why.

## 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, direct into the trustee bank account. Payments will not normally be made to parties other than the trustees.

## Does Canada Life offer any support services?

A confidential 24-hour bereavement counselling and probate helpline is available for family members.

## Section 1

**Please ensure this section is fully completed for all claims. If the name on the deed is different to that on our records, please notify us.**

Principal employer's name

Employer's name  
(if different from above)

Group policy number

## Section 2

**Please record account details below in all cases where a lump sum is being claimed. Payment by other means will delay settlement.**

### Trustee's bank account details

Name of bank

Branch

Trustees account name

Trustees of

Bank sort code

Account number

# Group Life Assurance

## Section 3

### Employee details

Full name	<input type="text"/>		
Gender	<input type="text"/>	Date of birth (day, month, year)	<input type="text"/>
Employee ID	<input type="text"/>		

## Section 4

### Spouse or partner details

Full name	<input type="text"/>		
Gender	<input type="text"/>	Date of birth (day, month, year)	<input type="text"/>
Date of death (day, month, year)	<input type="text"/>		

## Section 5

### Death occurring overseas

Please complete this part only if death occurred overseas.

Reason overseas	<input type="text"/>	Country of death	<input type="text"/>
Date departed from UK (day, month, year)	<input type="text"/>	Intended return date (day, month, year)	<input type="text"/>

## Section 6

### Benefit details

If cover is provided as a fixed benefit please complete section headed 'Fixed benefit'. If salary based benefits are insured please go to section headed 'Salaried benefit'.

#### Fixed benefit

Fixed benefit being claimed	<input type="text"/>	Date benefit selected	<input type="text"/>
Date of Canada Life acceptance	<input type="text"/>		
Previous benefit selections	<input type="text"/>	Date benefit selected	<input type="text"/>
	<input type="text"/>		<input type="text"/>
	<input type="text"/>		<input type="text"/>
	<input type="text"/>		<input type="text"/>

#### Salaried benefit

Salary multiple being claimed	<input type="text"/>	Date multiple selected	<input type="text"/>
Employee's scheme salary applicable at date of death	<input type="text"/>	Amount of lump sum benefit	<input type="text"/>
Previous benefits multiple selections	<input type="text"/>	Date multiple selected	<input type="text"/>
	<input type="text"/>		<input type="text"/>
	<input type="text"/>		<input type="text"/>
	<input type="text"/>		<input type="text"/>

# Group Life Assurance

## Section 7 Checklist

To ensure settlement of the claim is not delayed please check the following:

- The claim form has been fully completed
- Original certificates have been provided
- Evidence of earnings has been provided, if appropriate

## Section 8 Declaration

**This declaration must be signed in all cases by an authorised signatory only.**

We, the Trustees of the Group Policy, hereby apply for payment of the benefit(s) described above. We declare that the deceased was included in the Group Policy on the date of death and that the particulars set out above are correct to the best of our knowledge and belief.

Signature	<input type="text"/>	Date (day, month, year)	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Print name	<input type="text"/>						
Capacity of signatory*	<input type="text"/>						

\*This signature must be a Trustee or Authorised Signatory.

These should be sent as soon as possible to:  
**Life Claims Team, Canada Life Limited, 3 Rivergate, Temple Quay, Bristol BS1 6ER. 0117 916 4460.**

Our forms are available to download from our website: [www.canadalife.co.uk/group](http://www.canadalife.co.uk/group)

Canada Life Limited, registered in England no. 973271. Registered Office: Canada Life Place, Potters Bar, Hertfordshire EN6 5BA.

CLFIS (UK) Limited, registered in England no. 04356028 is an associate company of Canada Life Limited. Registered Office: Canada Life Place, Potters Bar, Hertfordshire EN6 5BA.

Canada Life Limited is authorised by the Prudential Regulation Authority and regulated by the Financial Conduct Authority and the Prudential Regulation Authority.

GRP671 – 212R



Canada Life Limited  
3 Rivergate, Temple Quay, Bristol BS1 6ER  
Telephone 0345 223 8000