

# Group Life – Notification of death claim form



This form should be completed by the policyholder.

## Policyholder's details

Policyholder name

Policy number

## Deceased's details

Deceased's full name

Date of birth

Date of death

Place of Death

Cause of death

Home address

Postcode

Deceased's job title

## Eligibility questions

Date joined company

Date joined scheme

Date last actively at work

Was the deceased still employed at their date of death?  Yes

No - date employment terminated

Was the deceased on a fixed term contract?  Yes - date contract would have ended

No

Insured salary

Lump sum insured

Where pension membership is part of the scheme's eligibility, we also require the following information.

Date eligible to join company pension scheme

Date joined company pension scheme

## Evidence of death

For most claims, we are able to confirm the death without needing the original death certificate.

However, we will need to see the original death certificate if:

- The member died outside the UK. We will also need a death abroad questionnaire completed.
- Benefits with Unum are more than £750,000

If only a coroner's interim certificate has been issued, we will need to see the original coroner's certificate.

## Payment details – Lump sum

- Own trust – complete section A below
- Unum Master Trust (Registered schemes) – complete section B below
- Unum Master Trust (Excepted schemes) – complete section B below

If you do not have your own trust and you are not using the Unum Master Trust, please contact us.

### Section A – Own trust

Scheme name

Please provide the trustees' bank account details where payment will be made or you can ask us to pay the beneficiaries direct on your behalf (with the permission of the trustees).

### Trustee account details

UK account name

Account number

Sort code  –  –

- Pay direct to beneficiaries.  
Please complete an instruction to pay direct to beneficiaries, which you can find here: **[Instruction to pay direct to beneficiaries](#)**

### Section B - Unum Master Trust

**(Complete this section if you are participating in any of the Unum Master Trusts)**

PTL Governance Limited (PTL) are the trustees. They will contact you to investigate the deceased's circumstances and identify their dependants. Please provide your contact details:

Contact name

Phone number

Email address

Address

Postcode

## Dependants' pensions

Are you also claiming for a death in service pension?

Yes – Please complete the dependant's pension supplement which you can find [here](#).

No

## Document checklist

Are the following enclosed with this form?

Original death certificate	<input type="checkbox"/> N/A	<input type="checkbox"/> Enclosed	<input type="checkbox"/> To follow
Original coroner's certificate	<input type="checkbox"/> N/A	<input type="checkbox"/> Enclosed	<input type="checkbox"/> To follow
Death abroad questionnaire	<input type="checkbox"/> N/A	<input type="checkbox"/> Enclosed	<input type="checkbox"/> To follow
Instruction to pay direct to beneficiaries	<input type="checkbox"/> N/A	<input type="checkbox"/> Enclosed	<input type="checkbox"/> To follow
Beneficiary nomination/ Expression of wish form	<input type="checkbox"/> N/A	<input type="checkbox"/> Enclosed	<input type="checkbox"/> To follow
Dependant's pension supplement	<input type="checkbox"/> N/A	<input type="checkbox"/> Enclosed	<input type="checkbox"/> To follow

## Submission statement

By submitting this completed notification of death claim form, you confirm that:

- All statements made are true and complete

and

- All information relevant to this benefit claim has been disclosed

Please note, if any information you have provided is found to be deliberately misleading or if you have not given us all the relevant information, we may reject your claim. We may also be entitled to keep any premiums you have paid.

Date completed

Contact name

Position in company

Phone number

Email address

Please make sure you have fully completed this submission statement and included your contact details. It may delay your claim if we need to return your form because of missing information.

You can email your form to us from your company's email (either directly or forwarded by your broker), or post it with a covering letter on your company's headed paper.