

Checklist - Death Claim Requirements (Individual Insurance)



Important Reminders:

- Submit only certified true copies except as indicated below
- Documents submitted will not be returned except as indicated below

Standard Claim Requirements

1. **Claimant's Statement** [form to be supplied by Sun Life of Canada (Phils.), Inc.] to be completed by designated primary beneficiary/ies or by authorized signatory if beneficiary is a company
Special Instruction: One Claimant's Statement per beneficiary
2. **Death Certificate** (original form with blue background or lines is not acceptable) duly certified by the Local Civil Registrar over his signature with Official Seal and bearing the Local Civil Registry Number and Documentary Stamps
3. Two (2) valid **Proofs of Identity** (preferably government issued IDs with photo and signature) of the beneficiary/ies

Additional Claim Requirements (submit requirements appropriate to your case)

If beneficiary is spouse

- **Marriage Certificate** issued by the National Statistics Office/Philippine Statistics Authority (original)

If beneficiary is minor (below 18 years old)

- **Birth or Baptismal Certificate** of the minor
- **Affidavit of Guardianship** [form to be supplied by Sun Life of Canada (Phils.), Inc.] if parent or other party is claiming on behalf of the minor
- **Guardian's Bond/Letters of Guardianship** approved by the court including the Summary of the Proceedings or the Petition if parent/ party other than parent is claiming on behalf of the minor (submit only upon approval of claim)

If beneficiary is company or corporation

- **Corporate Secretary's Certificate** indicating the name of the company's authorized signatory, the scope of his authority and his specimen signature
- Two (2) valid **Proofs of Identity** (preferably government issued IDs with photo and signature) of the authorized signatory
- **FATCA Declaration Form** [form to be supplied by Sun Life of Canada (Phils.), Inc.]
- Duly accomplished **W-9 or W-8BEN-E** [form may be downloaded from the IRS website - www.irs.gov/forms-pubs]

If beneficiary is creditor

- **Statement of Account** as of date of death, if with outstanding loan
- **Proof of Settlement of Loan or Certificate of Full Payment**, if loan has been paid in full

If beneficiary is estate

- **Estate settlement documents**

If claim is contestable (death occurred within two years from date of policy issue or last reinstatement)

- **Attending Physician's Statement** [form to be supplied by Sun Life of Canada (Phils.), Inc.]
- **Authorization** [form to be supplied by Sun Life of Canada (Phils.), Inc.]
- **Advisor's Statement** [form to be supplied by Sun Life of Canada (Phils.), Inc.]

If place of death is outside Philippines

- **Death Abroad Questionnaire** [form to be supplied by Sun Life of Canada (Phils.), Inc.]
- **Original Passport** (to be returned) and other documents related to the travel or death abroad
- **Original Death Certificate** authenticated by the Consul including the official English translation (to be returned)

If death is due to an accident or violence

- **Police Report**
- **Autopsy Report**
- **Toxicology Report**
- **Obituary or Newspaper Clippings**, if any
- **Hospital Records** (Admitting History and Discharge Summary or their equivalent)
- **Driver's License** if accident occurred while insured was driving a vehicle
- **Authorization** [form to be supplied by Sun Life of Canada (Phils.), Inc.]

If beneficiary is a U.S. Person or tax resident (including green card holder and dual citizen) or has U.S. Indicia (with any U.S. address or U.S. phone number)

- **FATCA Declaration Form** [form to be supplied by Sun Life of Canada (Phils.), Inc.]
- Duly accomplished **W-9 or W-8BEN** [form may be downloaded from the IRS website - www.irs.gov/forms-pubs]

Note: Other requirements may still be required after initial review of submitted requirements.

Contestable claims are subject to investigation and will affect processing time.

For further inquiries, please contact our Customer Care Center at telephone number 849-9888 from Mondays to Fridays, 8:00 a.m. to 7:00 p.m.

