

Checklist - Pre-Need Death Claim Requirements



Important Reminders:

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

Basic Claim Requirements

If Credit Group Life Benefit claim

1. **Death Certificate** (*blue-form 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

If with Group Yearly Renewable Term Benefit claim

1. **Claimant's Statement** [form to be supplied by Sun Life of Canada (Phils.), Inc.] to be completed by designated primary insurance beneficiary/ies or by two authorized signatories if beneficiary is a company
Special Instruction: Complete a separate Claimant's Statement for each plan unless all plans have the same beneficiary/ies
2. **Death Certificate** (*blue-form 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

If death is due to an accident or violence or if with Accidental Death and Dismemberment, Personal Accident Protection, Scholar Accident Protection or Family Accident Protection Benefit claim

1. **Claimant's Statement** [form to be supplied by Sun Life of Canada (Phils.), Inc.] to be completed by designated primary insurance beneficiary/ies or by two authorized signatories if beneficiary is a company
Special Instruction: Complete a separate Claimant's Statement for each plan unless all plans have the same beneficiary/ies
2. **Death Certificate** (*blue-form 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. **Police Report**
4. **Autopsy Report**
5. **Toxicology Report**
6. **Obituary or Newspaper Clippings**, if any
7. **Hospital Records** (*Admitting History and Discharge Summary or their equivalent*)
8. **Driver's License** if accident occurred while insured was driving a vehicle
9. **Authorization** [form to be supplied by Sun Life of Canada (Phils.), Inc.]

Additional Claim Requirements (*submit requirements appropriate to your case*)

If claim is contestable (*death occurred within a year from date of plan issue or last reinstatement*) submit also the following:

- **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.]
- **Hospital Records** (*Admitting History and Discharge Summary or their equivalent*)

If beneficiary is spouse

- **Marriage Contract** issued by the National Statistics Office (original)

If beneficiary is minor (*below eighteen (18) years of age*)

- **Birth or Baptismal Certificate** of the minor
- **Affidavit of Guardianship** [form to be supplied by Sun Life of Canada (Phils.), Inc.] if parents or other party is claiming on behalf of the minor
- **Guardian's Bond** approved by the court if parent is claiming on behalf of the minor (*submit only upon approval of claim*)
- **Letters of Guardianship** approved by the court if 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** with specimen signatures of two authorized signatories

If place of death is outside the 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

Note: *Other requirements may still be required after initial review of submitted documents. 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. or visit our website at www.sunlife.com.ph.

