

# CLAIM FORM

## IMPORTANT INFORMATION

Please complete in ENGLISH and BLOCK CAPITALS.

If you make a mistake completing this form, simply cross out the error, note the correct details and initial each correction.

In order for your claim to be processed as quickly as possible, we need some information about the claimant and the insured. Prior to completing this statement, please read the instructions on the back of this form. If there is more than one claimant, each claimant must complete a separate Claim Form.

The policy of insurance is issued or assumed by Transamerica Life (Bermuda) Ltd. ("TLB").

Please attach **one original/ notarized death certificate** for each insured.

### A. Information about the Insured

Select the box that applies

Policy number(s) under which you are presenting a claim	<input type="text"/>		
Insured's Name	<input type="text"/>		
ID Number	<input type="text"/> <input type="checkbox"/> NRIC Type <input type="checkbox"/> Passport <input type="checkbox"/> Other _____		
Address	Number/Street/Building		
	City		Province
	Country		Postal Code
Date of Birth	<input type="text"/> (dd/mm/yyyy)		
Date of Death	<input type="text"/> (dd/mm/yyyy)		
Cause of Death	<input type="text"/>		
Place of Death	<input type="text"/>		

**B. Complete this section only if the policy was issued or reinstated within two years of the date of death. Also, please return the policy, if possible.**

When did the insured first complain of or give other indications of last illness?			
When did the insured first consult a physician for last illness?			
Names of all physicians or practitioners who attended the insured within 5 years preceding death (attach additional sheet if necessary).			
Name	Address	Date of Attendance (dd/mm/yyyy)	Condition(s)

**C. Information about the Beneficiary/ Claimant**

Select the box that applies

Name	Given Name(s)	Surname	
Date of Birth		Nationality	
ID Number	Type <input type="checkbox"/> NRIC <input type="checkbox"/> Passport <input type="checkbox"/> Business Registration <input type="checkbox"/> Certificate of Incorporation <input type="checkbox"/> Other _____		
Relationship to the Insured			
Residential Address	Number/Street/Building		
	City	Province	
	Country	Postal Code	
Correspondence Address (If different from residential address)	Number/Street/Building		
	City	Province	
	Country	Postal Code	
Phone Number	Country Code - Area Code - Phone Number		
Occupation Title		Occupation Industry	

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**D. Other Life Insurance Coverage Details**

Select the box that applies

Insurance Company Name	Policy Number	Issue Year	Life Insurance Amount (USD)	Claim Status		
				Paid	Pending	Declined
				<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
				<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
				<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

\*If more than three other insurance coverage details, please provide details in the "Supplementary Information Section".

**E. Payment Instruction**

Select the box that applies

I/We, hereby, authorise TLB to arrange proceeds as follows (If no option is selected, proceeds will be paid by cheque to beneficiary):

Payment Method	<input type="checkbox"/> By cheque (applicable to amount less than USD500,000 or equivalent. For USD cheque, a local clearing USD cheque will be issued.)	<input type="checkbox"/> By Telegraphic Transfer (Please complete below Telegraphic Transfer Details Section.)
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**F. Telegraphic Transfer Details**

Correspondent Bank Information (if applicable)

Correspondent Bank Name	
Correspondent Bank Swift Code	
Correspondent Bank Address	

Beneficiary Bank Information

Beneficiary Account Holder Name	
Beneficiary Account Number	
Beneficiary Swift Code	
Beneficiary Bank Name	
Beneficiary Bank Address	

Note: Payment must be made to beneficiary/claimant only.

## Declaration, Consent and Authorisation

### I, THE BENEFICIARY/ CLAIMANT, HEREBY:

Consent and Authorise:

- a) any registered medical physician, medical practitioner, medical care provider, hospital, clinic, medical laboratory, government organisation or any other medical or medical related facility that has record or knowledge of the insured's health and medical history or treatments to provide such information about the insured (including diagnosis, examination and test results, medical reports, treatments and prognosis) with respect to any of the insured's physical or mental conditions and/or treatments to TLB (or its legal representatives); and
- b) TLB to disclose such medical or other information about the insured which has been provided to TLB or which TLB develops during its evaluation of any application or claim for life insurance to: (i) its reinsurers; (ii) any other insurance company that the insured may designate; (iii) any financial adviser representative that the insured may have designated; (iv) any medical professional that the insured may have designated; and (v) any person or entity entitled to receive such information by law.

## Personal Information Collection Statement

Transamerica Life (Bermuda) Ltd. ("TLB") is committed to complying with the Personal Data Protection Act 2012 ("PDPA") and any other applicable laws and regulations in relation to the collection, use, disclosure, transfer, retention and storage of your personal data.

### Collection

From time to time, it will be necessary for customers or other persons to supply TLB with personal data in connection with the establishment or continuation of business relationship, or provision of products or services. Failure to supply such data may result in TLB being unable to establish or continue the business relationship, or provide you with our products and services.

### Purpose

The personal data collected by TLB on this form, any supplementary forms or documents received, as part of the insurance application, any claims documentation or any other personal data collected during the course of other dealings with TLB may be used or disclosed from time to time for the following purposes:

- a) administering the insurance policy and providing services, and managing your account including access to and maintenance of any online platform in relation to the insurance policy;
  - b) investigating, defending, analyzing, processing and paying any claims under the insurance policy or an insurance policy under which any moneys may be payable to you or other persons entitled under such insurance policy;
  - c) invoicing and collecting premiums and outstanding amounts from the policy;
  - d) performing any functions and activities related to insurance products and/or services, market research, customer surveys and analysis or obtaining legal and professional advice;
  - e) resolving complaints, internal training and customer service quality assessment;
  - f) arranging reinsurance;
  - g) conducting and compiling statistics to study and evaluate behaviour, preferences and interests, develop new products and improve our services, identify trends, plan and execute business transactions;
  - h) exercising any rights TLB may have in connection with the provision to you of any services from time to time;
  - i) other ancillary purposes which are directly related to and serve to fulfill the above purposes; and
  - j) complying with the requirements under any laws and regulations, codes, guidelines, court order and requests from any local or foreign regulators, governmental bodies, or industry recognised bodies (whether within or outside Singapore) that is assumed by or imposed on TLB or any related companies of TLB including TLB's ultimate parent company, and any companies which are directly or indirectly held or controlled by such ultimate parent company (the "related companies") by reason of its financial, commercial, business or other interests or activities in or related to the jurisdiction of the relevant local or foreign regulators, governmental bodies, or industry recognised bodies.
- It is TLB's policy not to keep personal data for longer than is necessary for the fulfillment of the purpose for which that data is or is to be used.

### Transferees

The personal data collected by TLB will be kept confidential but subject to any applicable laws, TLB may disclose your personal data for the above purposes to the following classes of transferees (whether in Singapore or elsewhere):

- a) third party agents, contractors, assignees and advisors who provide administrative, communications, computer, payment, risk intelligence services, security or other services which assist us to carry out the above purposes (including medical service providers, emergency assistance service providers, telemarketers, mailing houses, IT service providers and data processors);
- b) any service provider that TLB collaborate with to provide its insurance products and services;
- c) in the event of a claim, loss adjudicators, claims investigators and medical advisors;
- d) in the event of dispute, Financial Industry Disputes Resolution Centre Ltd;
- e) insurance reference bureaus or credit reference bureaus;
- f) reinsurers and reinsurance brokers;
- g) any insurance intermediary which services this insurance policy (including the financial adviser representative (if you have one), and its successors or assigns);
- h) the owner of the policy (if different from the insured);
- i) TLB's legal and professional advisors;
- j) TLB's related companies;
- k) any assignee, transferee, participant or sub-participant of our rights or business;

### Personal Information Collection Statement (Continued)

- l) local insurance associations; and
- m) government agencies and authorities as required or permitted by law.

TLB may also use and disclose your personal data otherwise with your prior consent to the relevant use or disclosure.

#### **Access to and correction of personal data**

It is mandatory to provide all of the personal data requested on the claim form. Failure to provide all the personal data requested on this claim form may mean that TLB are unable to process your claim.

You may seek access to and request correction of any personal data TLB holds about you by sending a written request to: The Data Protection Officer, Transamerica Life (Bermuda) Ltd., Singapore Branch Office, 18 Cross Street #15-01, Cross Street Exchange, Singapore 048423.

A reasonable fee may be charged to offset any administrative and actual costs incurred by us in complying with your data access requests.

### Supplementary Information Section


The claimant understands that TLB may not have verified the status of the life insurance policy. The claimant agrees that by furnishing this form, TLB does not admit that any insurance was in force on the life of the deceased and does not waive any of its rights of defenses.

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### Fraud Warning

Any person who knowingly presents a false or fraudulent claim of a loss or benefit may be guilty of a crime and may be subject to fines and/ or confinement in prison.

### Declaration by Beneficiary/ Claimant

Select the box that applies

I/We agree that payment made to me/us pursuant to this claim in the manner as directed above fully and finally satisfies and discharges TLB's payment obligations to me/us under the policy and no further claim will be made by me/us under the policy.

Signature of Beneficiary/ Claimant																					
Signed at	(Country)	Date	<table border="1" style="width: 100%; height: 15px;"> <tr> <td style="width: 2.5%;"></td><td style="width: 2.5%;"></td><td style="width: 2.5%;"></td><td style="width: 2.5%;"></td><td style="width: 2.5%;"></td><td style="width: 2.5%;"></td><td style="width: 2.5%;"></td><td style="width: 2.5%;"></td><td style="width: 2.5%;"></td><td style="width: 2.5%;"></td><td style="width: 2.5%;"></td><td style="width: 2.5%;"></td><td style="width: 2.5%;"></td><td style="width: 2.5%;"></td><td style="width: 2.5%;"></td><td style="width: 2.5%;"></td><td style="width: 2.5%;"></td><td style="width: 2.5%;"></td> </tr> </table> (dd/mm/yyyy)																		
Name																					
Signature (include Title, if Corporation or Trust)	<b>X</b>																				

Signature of Witness to Beneficiary/ Claimant																					
Signed at	(Country)	Date	<table border="1" style="width: 100%; height: 15px;"> <tr> <td style="width: 2.5%;"></td><td style="width: 2.5%;"></td><td style="width: 2.5%;"></td><td style="width: 2.5%;"></td><td style="width: 2.5%;"></td><td style="width: 2.5%;"></td><td style="width: 2.5%;"></td><td style="width: 2.5%;"></td><td style="width: 2.5%;"></td><td style="width: 2.5%;"></td><td style="width: 2.5%;"></td><td style="width: 2.5%;"></td><td style="width: 2.5%;"></td><td style="width: 2.5%;"></td><td style="width: 2.5%;"></td><td style="width: 2.5%;"></td><td style="width: 2.5%;"></td><td style="width: 2.5%;"></td> </tr> </table> (dd/mm/yyyy)																		
Name																					
ID Number	Signature																				
Type <input type="checkbox"/> NRIC <input type="checkbox"/> Passport <input type="checkbox"/> Other _____	<b>X</b>																				
Address																					

The cost, if any, of completing claim requirements, is to be borne by the beneficiary or claimant.

## Documentary Requirement Checklist

The required claims documents listed below are for your reference only. We reserve the right to request additional information or documents to process your claim if necessary. We may not be able to process your request or your claim payment may be delayed if the required documents are not provided. All documents must be original or certified copies unless otherwise specified.

Document Required (Please "✓" against the documents you have submitted)	
Basic Document	<input type="checkbox"/> Original/ notarized death certificate *For a death certificate issued by the Singapore government, we will accept the digital copy(ies) <input type="checkbox"/> Identity document of insured <input type="checkbox"/> Completed "Claim Form" <input type="checkbox"/> Completed "Self-Certificate Form (Individual)" or "Self-Certification Form (Entity and Controlling Persons)" <input type="checkbox"/> Policy contract (if available) <input type="checkbox"/> Completed "Overseas Death Questionnaire Form" (if the death occurred outside the country of residence of the insured) <input type="checkbox"/> Autopsy report, police report & newspaper cuttings (if the death was due to accident or unnatural cause.)
Beneficiary as Individual	<input type="checkbox"/> Completed "Form W-8Ben"- required if beneficiary has U.S. indicia but not declared as U.S. tax resident status <input type="checkbox"/> Copy of proof of relationship between beneficiary and insured (e.g. Spouse - Marriage Certificate) <input type="checkbox"/> Identity document and address proof (within 3 months validity) of beneficiary
Beneficiary as an ENTITY	<input type="checkbox"/> Certificate of Incorporation <input type="checkbox"/> Company search undertaken within the last 3 months or copy of the certificate of incumbency (issued within 6 months of the application) <input type="checkbox"/> Articles of Association <input type="checkbox"/> Updated Authorized Signatory List and Board Resolution approving the Signatory List and the signor(s) to operate the policy for claims matter <input type="checkbox"/> Identity document of Person(s) with Executive Authority, if applicable <input type="checkbox"/> Identity document and address proof (within 3 months validity) of Director(s) <input type="checkbox"/> Identity document and address proof (within 3 months validity) of Authorized Signor(s) <input type="checkbox"/> Identity document and address proof (within 3 months validity) of Shareholder(s)/ Ultimate Beneficiary Owner(s) Additional documents for ENTITY with trust structure <input type="checkbox"/> Completed "Verification of Trust Agreement For Administration of Life Insurance Policy Form" <input type="checkbox"/> Trust Deed (with information on Settlor(s), Trustees, Protector(s) (if any), Trust Beneficiary(ies), Name and Date of Trust and Execution page with Settlor(s) and Trustees' signature) <input type="checkbox"/> Identity document and address proof (within 3 months validity) of Trustee(s) <input type="checkbox"/> Identity document and address proof (within 3 months validity) of Settlor(s) (if any) <input type="checkbox"/> Identity document and address proof (within 3 months validity) of Protector(s) (if any) <input type="checkbox"/> Identity document and address proof (within 3 months validity) of beneficiary(ies) mentioned in Trust (if any)
Beneficiary as Estate/ Intestate	<input type="checkbox"/> Letter of Probate/ The Grant of Letters of Administration <input type="checkbox"/> Identity document and address proof (within 3 months validity) of Administrator/Executor
Beneficiary as Minor/ Mentally Incompetent Person	<input type="checkbox"/> Legal Guardianship paper <input type="checkbox"/> Identity document and address proof (within 3 months validity) of the Guardian
Deceased Beneficiary	<input type="checkbox"/> Original/ notarized death certificate of the designated beneficiary <input type="checkbox"/> Copy of proof of relationship between deceased beneficiary and insured (e.g. Spouse - Marriage certificate)

Suitable certifier may include (a) a practising advocate, solicitor or foreign lawyer as defined in the Legal Profession Act (Chapter 161); (b) a member of the judiciary in a Financial Action Task Force member country; (c) an officer of an embassy, consulate or high commission of the country of issue of documentary verification of identity; (d) a Magistrate, Justice of the Peace, or Commissioner for Oaths appointed in Singapore or in an equivalent jurisdiction; (e) your financial adviser representative; (f) a notary public; or (g) government authorities of Singapore if required. Alternatively, you may visit our office at the above address and submit these documents in person. Any original document(s) will be returned as soon as possible after our review.