



Promis Life Claim Form

We understand that dealing with paperwork and claims is the last thing you want to do when you've lost a loved one. We will do our very best to help make it all as easy as possible. If you haven't already, please call a member of our claims team on **0800 907 0800** and they'll talk you through the process.

You can fill out this claim form and return it to us together with the required documents listed below.

Please send these documents to us at **Freepost CUSTOMER CARE PROMIS LIFE** – it's free and no other address details are needed.

We will return your original documents to you straight away.

Once we have received all the correct documents and the claim form, we will pay your claim within 2 working days and if this doesn't happen you'll get an extra £250 on top!

Plan details

Name of deceased

Date of death

Your details

Title

First name

Last name

Address

Date of Birth

Home number

Mobile number

Your relationship to the deceased

Email address

Required Documents

To help us process your claim we need the following documents to be sent to us;

- This completed claim form, signed by the person legally entitled to claim the payment
- An original Death Certificate (not a photocopy)
- Confirmation of your (the Claimant's) identity. Please refer to the end of this form for a full list of approved documents we can accept as confirmation of identity and how to get a certified copy
- If available, the original Plan Schedule document and any letters confirming changes to the Plan
- If there is no surviving plan owner, then please send a certified copy of the Grant of Representation and/or Last Will and Testament if either exist

We promise to help take care of you
Call us now on 0800 907 0800
Calls are free from landlines and mobiles





Account Information

Please give details of where you would like a claim payment to be sent. Claims will be paid to UK bank accounts only. If you wish for the proceeds to be paid to someone other than yourself, please ensure you include evidence of their identity as well as your own.

Account in the name of

Bank/Building Society name

Sort Code

Account Number

Declaration

- I declare that I am entitled to claim the proceeds from this plan as I am:
 - a) The **plan owner**
 - b) There is no surviving plan owner; I am named as a **Personal Representative** on the Grant of Probate/Letters of Administration
 - c) I am not applying for a Grant of Probate/Letters of Administration; I am named as a legal **Executor** in the Deceased's Will
 - d) There is no Will; I am the deceased's **next of kin**:
 Husband Wife Son Daughter Other (please specify)
- I am signing this form on behalf of all people legally entitled to claim. I understand that only one claim can be made under this plan and that I will be responsible for dealing with any dispute arising from any claim made by other potential claimants or family members
- I confirm the information I have provided regarding this claim is correct to the best of my knowledge and belief
- I understand that false statements or failure to provide relevant information may lead to my claim being refused
- I consent to the Insurer, or its representatives, seeking information relating to cause of death. This may include copies of medical information from the coroner or from any medical practitioner, or similar medical professional who has attended to the Life Insured
- The information you provide will be used to manage the administration and assessment of your claim and to comply with our regulatory requirements. We will not use the data for any other purpose

Signed:

Date:

Print Name: (in capitals):



For information

LEGAL DISCLAIMER: This information is for general guidance only and is not legal advice. If you need more details on your rights or legal advice, please contact an adviser or solicitor. We have tried to ensure that the information is accurate (as at April 2020). However, we will not accept liability for any loss, damage or inconvenience arising as a consequence of any use of the information.

The government website below provides some useful information on what to do when someone dies. It covers registering the death, arranging the funeral, bereavement benefits and how to deal with the estate.

www.gov.uk/when-someone-dies

INFORMATION ON INTESTACY: When a person dies without leaving a valid will, their property (the estate) must be shared out according to certain rules. These are called the rules of intestacy. A person who dies without leaving a will is called an intestate person. Only married or civil partners and some other close relatives can inherit under the rules of intestacy.

Married partners or civil partners inherit under the rules of intestacy only if they are married or in a civil partnership at the time of death. If you are divorced or if your civil partnership has been legally ended, you can't inherit under the rules of intestacy. Partners who have separated informally can still inherit under the rules of intestacy. Cohabiting partners who were neither married nor in a civil partnership can't inherit under the rules of intestacy.

Children of the intestate person can inherit if there is no surviving married or civil partner. If there is a surviving married or civil partner, the children can inherit only if the estate is worth more than a certain amount. All the children of the parent who has died intestate inherit equally from the estate. This also applies where a parent has children from different relationships.

Identity verification requirements

UK money laundering regulations require us to confirm your identity (name and address) before we pay out a claim. In order to confirm your identity, please provide either of the following:

One document from the UK Photo Identity documents list

Or

Two separate documents, one from the Evidence of name list (section 1) and one from the Evidence of current address list (section 2). The same document cannot be used to cover both sections, and they must each come from a different source.

The document needs to be original or a certified copy.

UK PHOTO IDENTITY DOCUMENTS

- Current signed UK Passport
- Current UK photocard driving licence
- National Identity Card
- Firearms Certificate of Shotgun licence
- Identity card issued by the Electoral Office for Northern Ireland

SECTION 1 – EVIDENCE OF NAME

- Birth Certificate
- Current full UK driving licence (old paper version)
- Current provisional UK driving licence (photocard)
- Current EEA passport or EU member state ID card
- UK bank or building society statement – dated within the last 3 months
- Letter confirming entitlement to a state or local authority funded benefit, including housing benefit and council tax benefit or state pension (no more than 3 months old)
- Residence permit issued by the Home Office to EU nationals

SECTION 2 – EVIDENCE OF CURRENT ADDRESS

- Current full UK driving licence (old paper version)
- Current provisional UK driving licence (photocard)
- Local Authority tax bill (valid for the current year)
- UK bank or building society statement (no more than 3 months old)
- UK utility bill (not including mobile phone bill) and no more than 3 months old.
- HMRC correspondence dated within the last 12 months.
- Local council rent card or tenancy agreement
- UK mortgage statement (dated within the last 12 months)

If you are unable to provide any of the documents, then please contact us.





How do I get a copy of a document certified?

Take your original document, together with a photocopy, to a professional person. For example:

- UK Lawyer
- Accountant
- Solicitor
- Barrister
- Tax Consultant
- Licensed Conveyancers
- Scotland Lawyer (Individual from the Faculty of Advocates)
- Notary (Individual from the Faculty of the Archbishop of Canterbury)
- Insolvency Practitioner
- Post Office

Important: The person you ask must not be related to you, living at the same address as you or in a relationship with you. You can also get documents certified at the Post Office.

Ask the professional to:

-  write 'I certify that this is a true copy of the original seen by me.' on the document
-  sign and date it
-  print their name under the signature
-  add their occupation, industry, address and telephone number