



GUIDELINES FOR COMPLETING THIS FORM

1. Complete the application form fully and in detail as it gives us important information.
2. Use the checklist below to ensure you provide us with all the necessary documents.
3. If you are a beneficiary and wish to deal with Old Mutual directly about your claim or require assistance, please contact us using the details below.

SCHEME DETAILS

Scheme name		Scheme code	
Employer name			

EMPLOYEE DETAILS

First name(s)											
Surname											
Identity number					Date of birth						
Date of joining employer											
Date of joining scheme											

REQUIREMENTS

Please indicate who the deceased is and send us the documents that are ticked for the relevant deceased person in the table below:

Employee ☐ Spouse/Child ☐

DOCUMENTS REQUIRED	DECEASED IS AN EMPLOYEE	DECEASED IS AN INSURED SPOUSE/ CHILD
Copy of death certificate, certified by a Commissioner of Oaths (If a handwritten abridged death certificate is submitted, this must be accompanied by a letter from the Department of Home Affairs with the reason why a handwritten abridged death certificate was provided)	✓	✓
Notification of death/stillbirth form - all 3 pages (DHA 1663/BI 1663)	✓	✓
Police report for unnatural/accidental deaths	✓	✓
Certified copy of employee's identity document	✓	✓
Employee's latest payslip	✓	✓
Completed Family Cover Benefit Claim Form (this form)	Section 1 only	Section 2 only
Completed Beneficiary Nomination Form for family cover benefits	✓	Not required
Beneficiary's bank statement and certified copy of identity document	✓	Not required
Employee's bank statement	Not required	✓
Certified copy of the insured spouse's identity document/insured child's unabridged birth certificate	Not required	✓
Proof of relationship of the spouse/child to the employee: Spouse: • Certified copy of marriage certificate, or • Declaration from a third party confirming the duration of the relationship, on a formal letterhead, signed and stamped, e.g. Traditional Leader, Minister of religion, and • Employer records, Beneficiary Nomination Form or Medical Scheme Nomination Form Child: • If biological or stepchild: affidavit from the other parent/third party confirming the relationship between the child and the employee, or • If adopted child: adoption/guardianship letter from the High Court or SASSA grant letter, or • If child is stillborn: letter from the doctor/hospital confirming the gestational age of foetus • Employer records, Beneficiary Nomination Form or Medical Scheme Nomination Form	Only required if payment is to be made to surviving family member (see section 1)	✓

***Please note that if you are submitting a claim for extended family benefits:**

- Provide the requirements listed above for insured spouse/child, and the Extended Family Nomination Form
- Complete section 2.

You are welcome to contact us at 021 509 4351 should you require assistance with completing and submitting this form.

Submit the form by email, fax or post:

Email gapdeathclaims@oldmutual.com
 Fax 021 509 4669
 Address Death Claims Team (6J)
 Old Mutual
 PO Box 2386
 Cape Town
 8000

A NOTE TO BENEFICIARIES

Please indicate whether you consent to Old Mutual:

- ☐ communicating with the policy holder, OR
- ☐ communicating with you directly, using the details provided below:

First name(s)

Surname

Email address

Cellphone number

**PROTECTION OF PERSONAL INFORMATION DISCLOSURE**

The personal information received by Old Mutual in accordance with this contract will be used, as and when appropriate, for the following purposes:

- Underwriting
- Assessment and processing of claims
- Claims checks (Life and Claims Register)
- Fraud prevention and detection
- Tracing beneficiaries
- Audit and record keeping purposes
- Compliance with legal and regulatory requirements
- Verification of the personal information provided

Personal Information will be de-identified when used for market research and statistical analysis.

When Old Mutual engages service providers to process personal information on its behalf or to render services to it, Old Mutual may share some personal information with these service providers, subject to confidentiality agreements being in place between Old Mutual and such service providers. Should these service providers be abroad, Old Mutual will not share the personal information with them unless it is satisfied that adequate security measures are in place to protect the personal information.

The Policyholder is advised and encouraged to inform all members/lives assured that Old Mutual holds and is processing their personal information for the purposes noted above. The Policyholder or a member/life assured may access the personal information relating to him or her and, subject to the provisions this contract may request the correction of any errors or the deletion of this information. In certain cases the Policyholder and members/lives assured have the right to object to the processing of their personal information.

The Policyholder or members/lives assured have the right to complain to the Information Regulator, whose contact details are:

Website justice.gov.za/inforeg/index.html
Tel 012 406 4818
Fax 086 500 3351
Email inforeg@justice.gov.za

Old Mutual's full privacy notice can be viewed at www.oldmutual.co.za/privacy-policy/

EMPLOYER/CLAIMANT DECLARATION

I, the undersigned, in my capacity as and
duly authorised to make this declaration, hereby declare:

- a) That the information provided in this claim is true and correct, and that no information has been omitted or withheld
- b) That the insured person whose death gave rise to this claim has in fact died
- c) That payment of the proceeds, due in respect of the above insured person in terms of the aforementioned policy, shall represent the full and final discharge of Old Mutual Group Assurance's liability in respect of this insured person

I indemnify Old Mutual Group Assurance against any claim that may arise from any incorrect information provided in this form.

Signed at on this day of 20

Full name

Designation/Relationship to employee

Cellphone number

Email address

Signature

1

ONLY COMPLETE IF THE DECEASED IS THE EMPLOYEE**DETAILS OF EMPLOYEE'S DEATH**

Date of death

D	D	M	M	Y	Y	Y	Y
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Main cause of death

BENEFICIARY DETAILS**Please select ONE option below:**a) The most current nomination form for group family benefits has been attached to this claim application ☐

b) If no nomination form can be located from the deceased, please select one option below:

- There is no surviving family member (this benefit will be paid into the deceased's estate) ☐
 - There is a surviving family member (either surviving spouse, child over the age of 18/legal guardian of minor child, parent, brother or sister). ☐
- Please provide details below.

First name(s)

Surname

Identity number

Relationship to the employee

Email address

Cellphone number

PAYMENT DETAILS

Please provide the account details of the beneficiary on the nomination form; OR the next of kin; OR the deceased's Estate according to the option selected above.

Account holder's name

Bank name

Account number

Branch/SWIFT code

2

ONLY COMPLETE IF THE DECEASED IS AN INSURED SPOUSE OR CHILD**INSURED SPOUSE OR CHILD DETAILS**

First name(s)									
Surname									
Identity number									
Date of birth	<table border="1"><tr><td>D</td><td>D</td><td>M</td><td>M</td><td>Y</td><td>Y</td><td>Y</td><td>Y</td></tr></table>	D	D	M	M	Y	Y	Y	Y
D	D	M	M	Y	Y	Y	Y		
Relationship to the employee									
Date of death	<table border="1"><tr><td>D</td><td>D</td><td>M</td><td>M</td><td>Y</td><td>Y</td><td>Y</td><td>Y</td></tr></table>	D	D	M	M	Y	Y	Y	Y
D	D	M	M	Y	Y	Y	Y		
Main cause of death									
If deceased is stillborn, please provide gestational age of foetus weeks									

PAYMENT DETAILS

Please provide the bank details of the employee below:

Account holder's name	
Bank name	
Account number	
Branch/SWIFT code	

