

Bereavement Claim Form

To be completed by the person claiming

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The Scottish Friendly Group of Companies consists of the following companies:

Scottish Friendly Assurance Society Limited - Authorised by the Prudential Regulation Authority and regulated by the Financial Conduct Authority and the Prudential Regulation Authority. Member of AFM. Member of ABI : Life, Savings and Investments.

Scottish Friendly Asset Managers Limited - Authorised and regulated by the Financial Conduct Authority. Member of IMA.

Registered In Scotland No 187215 : OEIC Managers, ISA Managers. Scottish Friendly Insurance Services Limited - Authorised and regulated by the Financial Conduct Authority. Registered in Scotland No 113007. SFIS (Nominees) Limited. Registered in Scotland No 397351.

Section 1. About the person who has passed away

Policy Number(s):

Name:

Date of Death:

Date of Birth:

Section 2. About the person who is claiming

Name:

Address:

Postal code:

Date of birth:

Telephone number:

Email address:

Relationship to the
deceased (see note 1):

Were you responsible
for paying the funeral
account (see note 2):

Yes

No

Section 5. Declaration (see note 5)

[5.1] In signing this form, all claimants are accepting the following declarations:

- I/we apply for the payment of the monies due under the policy(ies) stated above.
- To the best of my/our knowledge and belief, the information provided in this form is correct, and I/we authorise payment to be made to the named payee.
- I/we agree that any payment made by Scottish Friendly shall be in full and final settlement of my/our claim on the policies stated above.
- I/we understand that making a false claim, or supplying false information, could leave me/us liable to legal action.
- I/we agree for verification checks to be carried out to establish identity.

[5.2] If you are claiming without supplying a Grant of Representation, in signing this form you are agreeing to your acceptance of the following statement:

In consideration of the payment made by Scottish Friendly to me/us under the above policy(ies) without production of a Grant of Representation, I/we hereby agree to indemnify Scottish Friendly against all losses, claims, costs and demands to which Scottish Friendly may be put in consequence of such payment.

First claimant:

Signed:

Date:

Second claimant (if applicable):

Signed:

Date:

Third claimant (if applicable):

Signed:

Date:

Section Notes to assist with completing the claim form:

Note 1: Relationship to the deceased.

Enter the capacity in which you are claiming. For example, are you:

- The Proposer of the policy: i.e. the owner of a policy written on the deceased's life.
- The deceased's Executor: i.e. the person appointed in the deceased's will to ensure that his / her wishes are carried out in relation to how his / her assets and property are to be dispersed.
- The deceased's Nominee: i.e. the person designated by the policyholder to receive the proceeds of an insurance policy in the event of his / her death. If this is the case, we will need to see a copy of the Nomination Form.
- The deceased's Assignee: i.e. a person or company to whom ownership of policy benefits has been transferred by deed of assignment. If this is the case, we will need to see a copy of the Deed of Assignment.
- If you are none of these, please state your relationship to the deceased, for example spouse, son / daughter, parent, sibling, etc.

Note 2: The Funeral Account

If you send us the invoice for the funeral account, we will use the proceeds of the policy (or policies) being claimed to pay the funeral director. We will notify you when we pay the funeral director. Any surplus funds will be paid to the claimant. If there are insufficient funds from the policy to pay for the funeral, then the claimant will need to make up the shortfall.

If the funeral account has already been paid, please send us the original receipt, and we will reimburse the payer of the account using the proceeds of the policy (or policies) being claimed.

Note 3: Payment details

Payment will be made by direct credit to your bank account, so it is important that you complete this section properly. Please remember that once the payment reaches your account, it will take a minimum of 2 or 3 days to clear and allow you access to your money.

Note 4: Grant of Representation (title to claim)

A Grant of Representation is a document issued by the Court that enables the person(s) named in it to deal with the assets and belongings (the 'estate') of a deceased person.

The term 'Confirmation' is used in Scotland, while 'Probate' is the equivalent English, Wales and Ireland. You can apply to have your claim settled without producing a Grant of Representation if:

(i) if you think your total claim will be for no more than £25,000,

OR

(ii) if you are the deceased's spouse, and if the total claim value payable is no more than £100,000.

If you do not provide a Grant of Representation, then we are obliged to settle to the deceased's next of kin as established in the following order by the law of intestacy: (i) spouse, (ii) children, (iii) parents (iv) siblings.

In all circumstances, Scottish Friendly reserves the right to insist on sight of a Grant of Representation if it's deemed necessary.

Note 5: Declaration

By signing the declaration, you confirm your acceptance of the statements contained therein.

If there is more than one person who is legally entitled to claim on the policy(ies), then the declaration must be signed by each such person.

If you are applying to have your claim paid without producing a Grant of Representation, then you must agree to recompense us if we have to make payment again to a subsequent claimant who produces a grant.