

# Pension Claim

## Claim Form

This form will ask you about your claim and the policies involved in the claim.  
Please complete sections 1,2,3,4,5,7 & 8 in all cases.  
Section 6 should be completed if there are equal next of kin claiming benefits.  
The claim form should be completed in block capitals.

### Section 1 About the deceased life assured

Full name of the deceased life insured

Marital status of deceased (single, married/civil partnership, divorced, widowed)

### Section 2 About the claim

Did the deceased life insured leave a Will? YES  NO

Has a Grant of Representation been obtained or do you intend to obtain one? (see Explanatory Notes) YES  NO

Is the claimant claiming as the nearest and only next of kin? YES  NO

If you answered "No" to this question please list the names and addresses of other equal next of kin in section 6

### Section 3 About the claimant

Full name

Full address

Postcode

Date of Birth

Home telephone number:

Work telephone number:

Relationship to the deceased life insured.

If Executor of the Will, please state "Executor"

### Section 4 Legal Personal Representative

Full name

Full address

Postcode

Home telephone number:

Work telephone number:

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## Section 5 Financial Dependants

Did the deceased have any financial dependants?

YES  NO

If YES, please provide details below.

Name	Address	Relationship to deceased	Date of Birth

## Section 6 Other equal next of kin

Name	Address	Relationship to deceased	Age if under 18

**Note:** The priority used to determine the next of kin is:

1. Husband/wife or civil partner
2. Sons and daughters or their children
3. Parents
4. Brothers and sisters or their children
5. More distant relatives

Step relatives should not be included.

In Scotland, parents and brothers and sisters share priority and in this case all should be shown.

## Section 7 Your declaration

I declare that to the best of my knowledge and belief the answers I have given are true and correct.

Signed

Dated

Capacity (e.g. Executor)

## Section 8 Enclosures

You will need to send us the documents listed below so that we can deal with your claim. If you do not send us the correct documents, this may result in a delay in payment of your claim. In all cases, we need the policies, original death certificate and premium receipt book(s), if available. Please tick the boxes to show which documents you have sent us.

- |  |  |
|--|--|
| <input type="checkbox"/> Original policy documents on the life of the deceased | <input type="checkbox"/> Grant of Representation, if applicable                      |
| <input type="checkbox"/> Original Death Certificate                            | <input type="checkbox"/> Spouse's/Civil Partner's Birth Certificate                  |
| <input type="checkbox"/> Original Will (if there is one)                       | <input type="checkbox"/> Spouse's Marriage Certificate/Civil Partnership Certificate |

# **Pension Claim**

## **Explanatory Notes**

### **Executor**

A person or organisation, appointed in the Will of the deceased to deal with the estate.

### **Grant of Representation**

This is the legal document you will have to obtain if the deceased left any substantial assets in their sole name. We will need to see the Grant if our policies exceed £10,000 or you require a Grant for other purposes. We can ask to see the Grant for amounts below £10,000 but will not generally do so. Assets held in joint names for example, a house, can be disregarded where ownership will pass automatically to the survivor.

### **Original Death Certificate**

We are required by Her Majesty's Stationery Office to only accept original Death Certificate and not copies. This is with regards to copyright and has not been imposed by Liverpool Victoria Friendly Society.