

# Death Claim Form

To be completed by Each Claimant



Policy Number

Please properly accomplish this form and provide complete and detailed information. Requests received by FWD service counters within the cut-off time of 2:00 PM will be processed within the day. Requests received beyond cut-off will be processed the next business day.

## 1. General information

### Policy Owner Information

Name of Policy Owner (Title, First Name, Middle Name, Last Name)			Date of Birth (mm/dd/yyyy)
Present Occupation	Mobile Number	Email Address	Mailing Address

### Insured Information (if different from Policy Owner)

Name of Insured (Title, First Name, Middle Name, Last Name)			Date of Birth (mm/dd/yyyy)
Present Occupation	Mobile Number	Email Address	Mailing Address

## 2. Claimant's statement (Please provide complete and detailed answers to the following questions)

### 1. Details of Death of Insured:

a. Date of death (mm/dd/yyyy)	b. Place of death:	c. Date and place of interment (mm/dd/yyyy)
d. Cause of death:		

### 2. If death due to accident:

a. Narrate in details how accident happened:	
b. Date and Time of accident	c. Place of accident

### 3. Health History of Insured:

a. Date first complained or showed symptoms of last illness:	b. Date first consulted a physician for last illness/accident:
c. Sign/s or symptom/s experience and indications of Insured's failing health:	
d. How long did the Insured suffered from this condition?	

### 4. Physicians who attended Insured and Hospitals where Insured was admitted:

Name of Physician	Name of Hospital/Clinic/Address	Inclusive Dates (From - To)	Diagnosis / Treatment

### 5. Other Insurance Policies of the Insured:

Name of Insurance Company	Policy Number	Issue Date	Amount of Insurance

**3. Beneficiary's information and affirmation**

Name of Beneficiary (Title, First Name, Middle Name, Last Name)		Relationship with the Deceased
Date of Birth (mm/dd/yyyy)	Place and Country of Birth	Nationality
Contact Information (Country Code)(Area Code)(Telephone/Mobile Number)	Email Address	Mailing Address

**U.S. Tax Declaration**

1. Are you a citizen, taxpayer, passport or green card holder of the U.S. or were born in the U.S.?  Yes  No  
 If yes, please provide a copy of your IRS W-Form and the below information:  
 U.S. I.D. / Passport no. / Green Card No. \_\_\_\_\_  
 U.S. Tax Identification Number / Social Security Number \_\_\_\_\_  
 U.S. Permanent residence address \_\_\_\_\_
2. For Corporate Accounts only:  
 Do you have a beneficial ownership holding 10% or more or any (direct or indirect) interest by a U.S. citizen, taxpayer, resident or entity?  Yes  No

**4. Claimant's information and affirmation (Please provide details below if Claimant is different from the named Beneficiary)**

If you are filing in behalf of a MINOR BENEFICIARY:

1. In what capacity are you filing this claim for?	<input type="checkbox"/> as Trustee	<input type="checkbox"/> as Guardian
2. Is the minor beneficiary under your actual custody and support?	<input type="checkbox"/> Yes	<input type="checkbox"/> No
3. State your relationship with the minor beneficiary.		

**Claimant's Information**

Name of Claimant (Title, First Name, Middle Name, Last Name)		Relationship with the Beneficiary
Date of Birth (mm/dd/yyyy)	Place and Country of Birth	Nationality
Contact Information (Country Code)(Area Code)(Telephone/Mobile Number)	Email Address	Mailing Address

**U.S. Tax Declaration**

1. Are you a citizen, taxpayer, passport or green card holder of the U.S. or were born in the U.S.?  Yes  No  
 If yes, please provide a copy of your IRS W-Form and the below information:  
 U.S. I.D. / Passport no. / Green Card No. \_\_\_\_\_  
 U.S. Tax Identification Number / Social Security Number \_\_\_\_\_  
 U.S. Permanent residence address \_\_\_\_\_
2. For Corporate Accounts only:  
 Do you have a beneficial ownership holding 10% or more or any (direct or indirect) interest by a U.S. citizen, taxpayer, resident or entity?  Yes  No

**5. Pay out option**

- Check  Credit to my Bank Account (please fillout details in below box)

Bank: <input type="radio"/> BPI <input type="radio"/> BDO <input type="radio"/> SBC <input type="radio"/> Metrobank <input type="radio"/> Others: _____	Type of Account: <input type="radio"/> Savings <input type="radio"/> Checking
Account Name:	Account Number:
	Branch Name:
In this option, I authorize FWD to credit the proceeds to the Bank Account specified above. I certify that I am the owner of the specified bank account.	

**6. Declaration and affirmation**

I UNDERSTAND AND CONFIRM THAT:

1. The information I have provided above and in any supporting documents and/or records (collectively defined as this 'Form') are true and complete and shall form part and be the basis of the assessment of this request and approval. I understand that providing false, inaccurate or incomplete information may result in my transaction request being denied and shall give FWD the right to cancel the Policy, repudiate the claim or forfeit all payments to be made.
2. The payment by FWD of the benefit or any refund (of premiums or total account value plus insurance charges) as a result of this claim through check or direct credit to the specified bank account number shall release and forever discharge FWD from all actions, claims and demands on all matters involving the benefit, the refund or its amount. Further, I certify the correctness and accuracy of the above information I provided to FWD and I understand that any discrepancy may cause delay in the disbursement of the proceeds.
3. In consideration of the payment by FWD of the benefit or any refund (of premiums or total account value plus insurance charges) as a result of this claim, I shall hereby release and waive any and all actions of whatever nature, expected, real or apparent, that I/we have against FWD, its affiliates, subsidiaries, parent or holding companies, their owners, directors, stockholders, executives, officers, employees, and agents, including their assigns and successors-in-interest in relation to the claim.
4. I hereby declare that I will not institute any action, whether civil, criminal, administrative, and all actions of whatever nature before any court, Insurance Commission or any regulatory body or government agency against FWD, its affiliates, subsidiaries, parent or holding companies, their owners, directors, stockholders, executives, officers, employees, and agents, including their assigns and successors-in-interest in relation to the claim.
5. Section 251 of the Insurance Code, as amended, imposes a fine not exceeding twice the amount claimed and / or imprisonment of two (2) years, or both, at the discretion of the court, to any person who presents or causes to be presented any fraudulent claim for the payment of a loss under a contract of insurance, and who fraudulently prepares, makes or subscribes any writing with intent to present or use the same, or to allow it to be presented in support of any claim.

**7. Data privacy and consent declaration**

By signing and submitting this Form to FWD, I expressly consent to the following:

- a. FWD may collect, use, and store the information provided in this Form to process this request and to service my policies. These shall also be used to update and/or form part of my existing account information and may further be processed and shared for underwriting, reinsurance, policy issuance and administration, claims adjudication, data analytics, historical and scientific research, profiling, risk management, enhancement of products and services, identity verification, protection against fraud, and to comply with legal, regulatory, or contractual requirements. I acknowledge that in certain instances, my information may be processed through automated means.
- b. I understand that FWD reports to its parent company located in Hong Kong and may engage third-party service providers and partners who, in some instances, may be located outside the Philippines. As necessary, my personal and policy information may be processed, shared, stored, and be subject to the laws of these foreign jurisdictions. FWD and its affiliates (FWD Group), third-party service providers and partners, are required to protect the confidentiality of my personal information in a manner consistent with data protection principles.
- c. I authorize FWD to disclose my personal and financial information to FWD Group and any government or tax authority (within or outside the Philippines) for the purposes of ensuring FWD's and FWD Group's continual compliance with applicable laws, regulations, guidelines and good market practices. I also agree that FWD has the right to require any of my/our heirs, claimants, assignees and/or authorized representatives to:
  - i. provide FWD with their respective personal and financial information;
  - ii. sign and submit such documents as FWD may reasonably require; and
  - iii. authorize FWD to disclose such personal and financial information to relevant Filipino and/or foreign government and/or tax authorities.
- d. FWD may contact me to request or clarify information to process this application, send me policy information, and perform other relevant activities to service this policies/request.

Privacy Policy:

Your privacy is a priority for FWD. The Company keeps your personal information about you and the products and services you have with us in confidence. For more information and copy of our Privacy Policy, kindly visit our website at <https://www.fwd.com.ph/en/privacy-policy/>. You may also email our Data Protection Office at [dataprotection.ph@fwd.com](mailto:dataprotection.ph@fwd.com) for any privacy concerns related to your personal information provided to us.

I expressly consent to the foregoing Data Privacy Declaration and understand that my failure or refusal to give consent may result to the denial of, or inaction on this Claim: (Please tick box)  
 Yes  No

**8. Authorization**

I authorize FWD and/or its duly authorized representative to secure whatever information and/or records from any of Insured's employer, business partners, co-employees, staff, consultants, physician, surgeon, hospital, clinic, other medically related facility, and any private or government agency or organization or institution, insurance industry association or from any individual person, who has any records and/or knowledge or any information with regards to the Insured's employment, business, health, illness, sickness, condition, disability and/or injury, hospital confinement including all medical history as described in this Form.

I authorize the said individuals and/or entities that has/have knowledge and access to or custody of any of the records and information regarding Insured's employment, business, health, Hospital confinement and all medical history to furnish, disclose and release to FWD or its authorized representative. This authorization is in connection with the application for Claims.

I acknowledge and authorize FWD to use any medical and relative information that they have secured or received to process my claim application.

I have fully read and understood and declare that I voluntary and willingly accomplished this Form with full knowledge of my rights under the law.

This Form shall be binding upon my heirs, executors, administrators, legal representatives, successors and assigns.

Place of signing \_\_\_\_\_ Date: 

m	m	d	d	y	y	y	y
---	---	---	---	---	---	---	---

\_\_\_\_\_  
Beneficiary/Claimant's Signature over Printed Name

Note: (1) If this form will be signed outside the Philippines, please have the form duly authenticated at the nearest Philippine Embassy or Consulate in your locality. (2) The witness should be a disinterested adult person.

Please do not sign on blank form