

Jubilee
LIFE INSURANCE

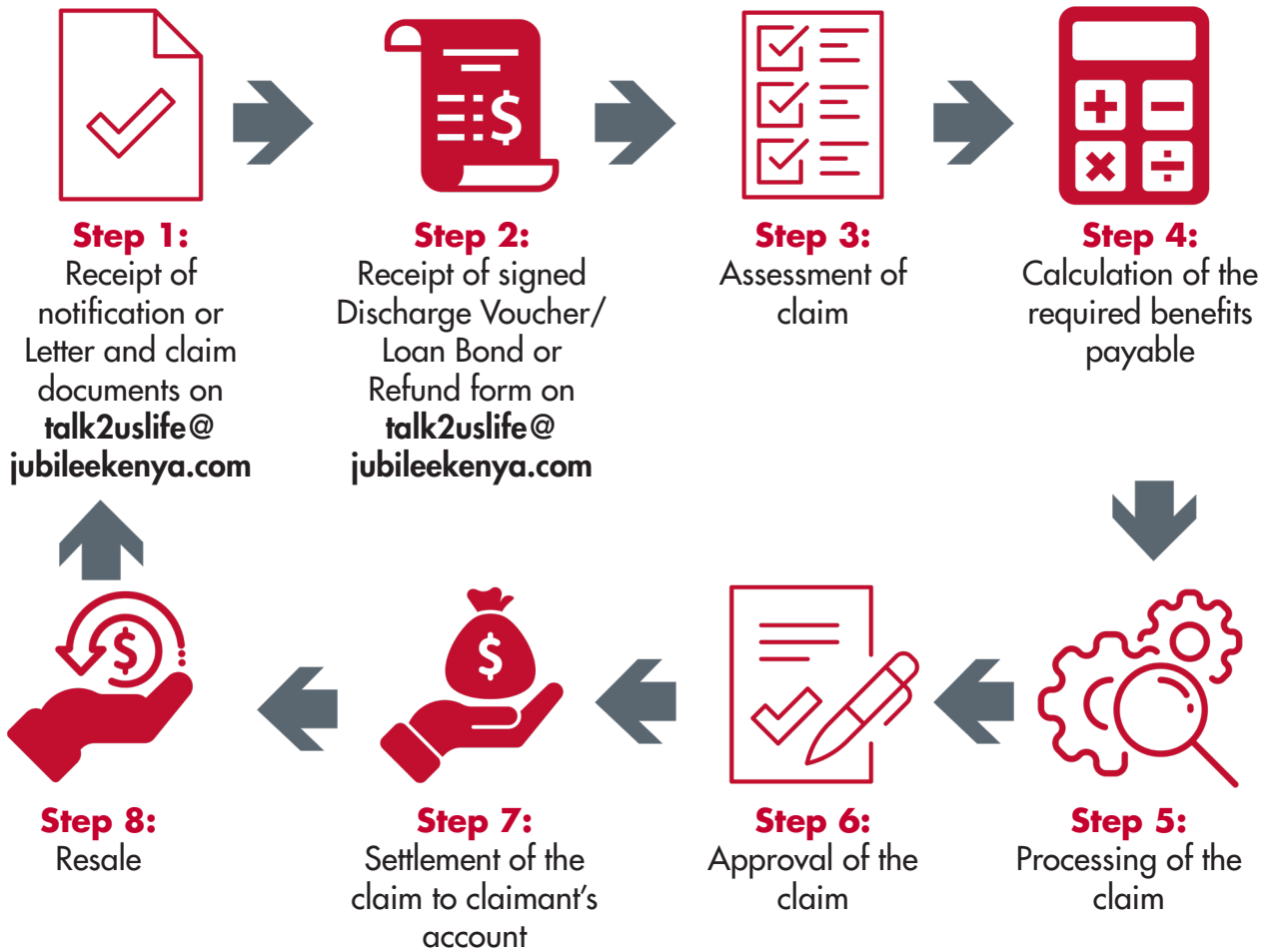


**RETAIL LIFE & PENSION CLAIM
PROCESS & DOCUMENTATION
REQUIRED**

LIFE BENEFITS AND CLAIMS

SECTION A: MATURITY BENEFITS

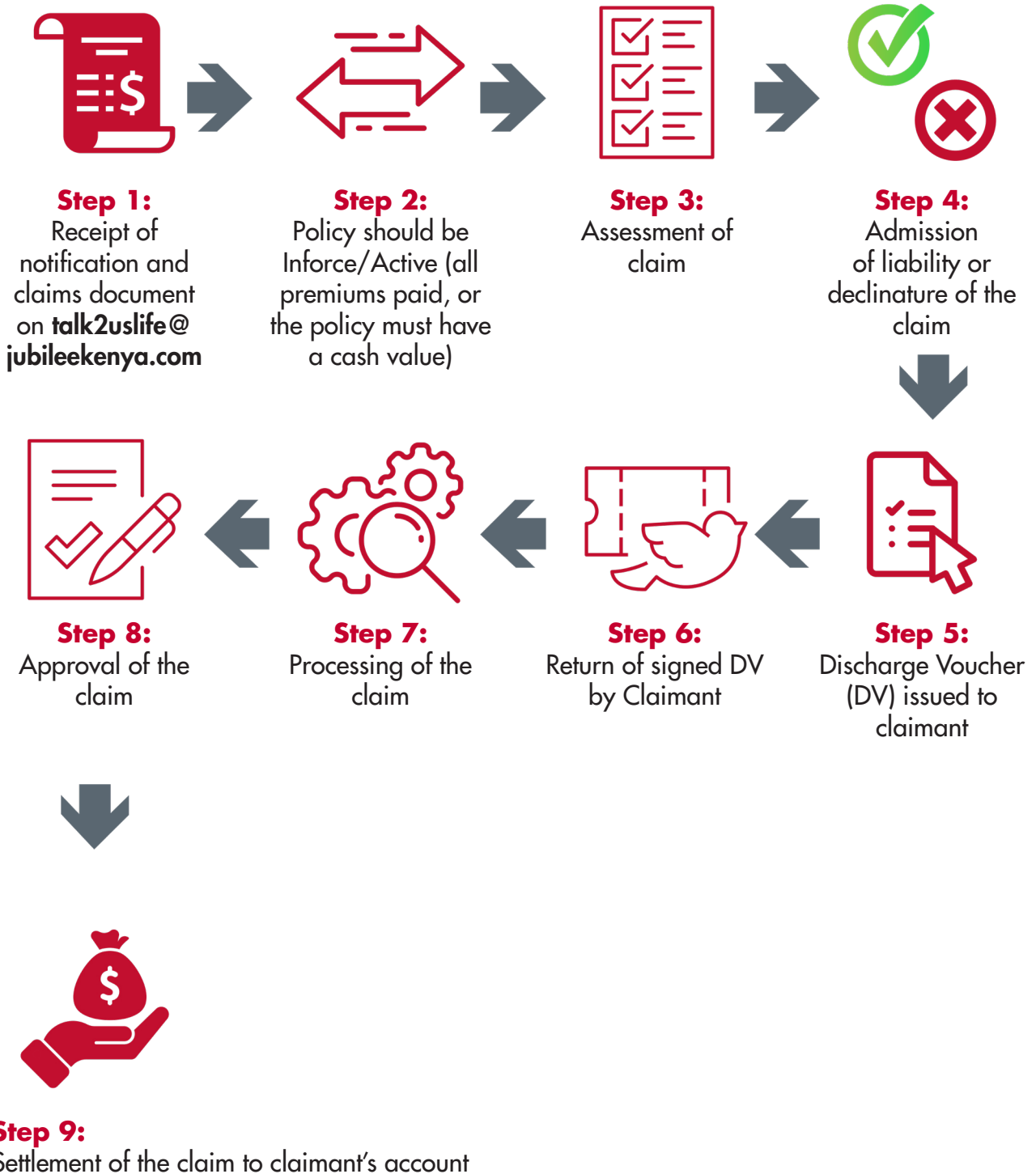
Process



MATURITY & CASH PAY-OUTS/PAYMENT (PARTIAL MATURITIES) DOCUMENTATION	LOAN DOCUMENTATION
<ul style="list-style-type: none"> • Maturity/Cash Payment Discharge Voucher • Original Policy Document • Copy of ID • KRA PIN • Bank Details (certified bank statement & completed EFT form) 	<ul style="list-style-type: none"> • Loan request letter • Signed Loan Bond • Original Policy Document • Copy of ID • KRA PIN • Bank Details (certified bank statement & completed EFT form)
SURRENDER DOCUMENTATION	REFUND CLAIMS DOCUMENTATION
<ul style="list-style-type: none"> • Surrender request letter • Surrender Discharge Voucher • Original Policy Document • Copy of ID • KRA PIN • Bank Details (certified bank statement & completed EFT form) 	<ul style="list-style-type: none"> • Refund Form • Original Policy Document (for Cancellation of Policies) • Copy of ID • KRA PIN • Bank Details (certified bank statement & completed EFT form) • Refund request letter

SECTION B: DEATH & DISABILITY CLAIMS

Process





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YOUR SAVINGS AND INVESTMENT PARTNER

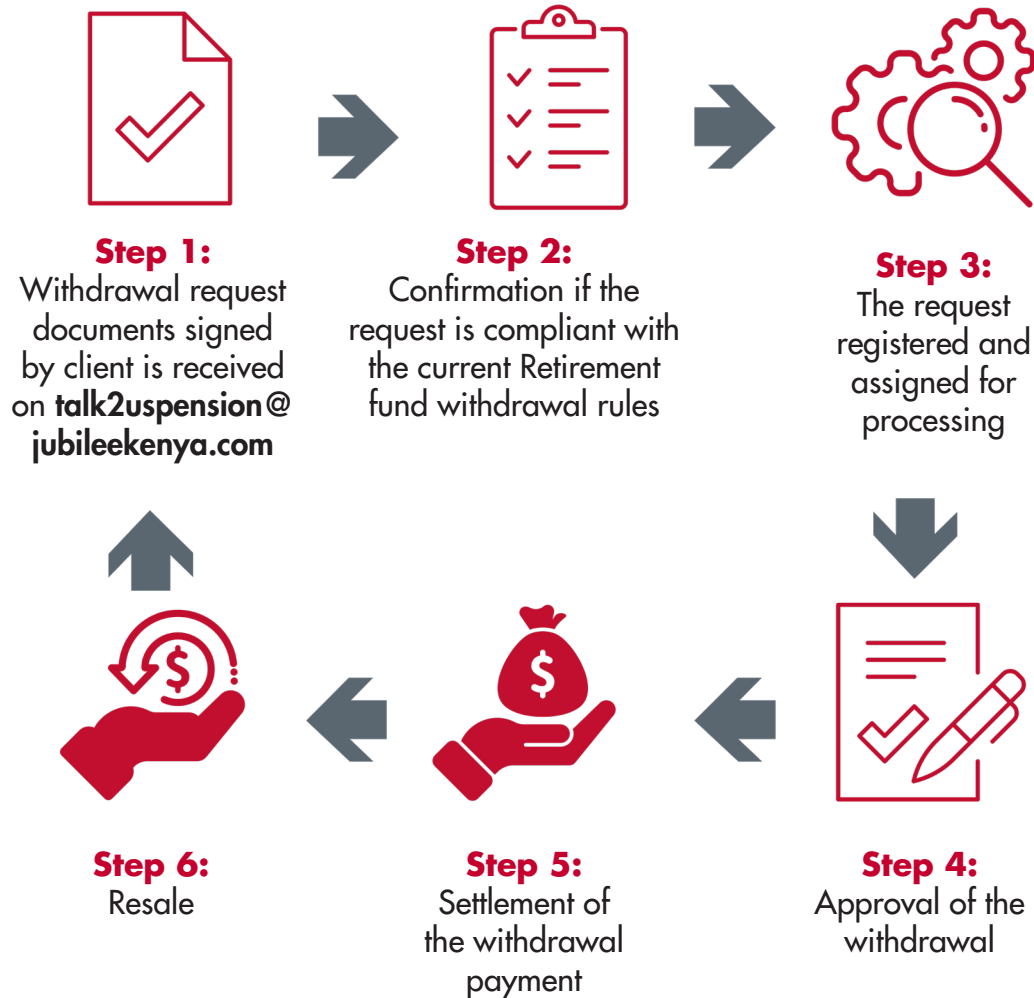
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DEATH CLAIM DOCUMENTATION	DISABILITY CLAIM BENEFITS DOCUMENTATION
<ul style="list-style-type: none"> • Death Notification (email or official letter) • Certificate of Attending Physician • Original Death Certificate • Original Policy Document • Claimant's Statement • Copy of Deceased ID or Letter of Surrender of ID • Doctor's Summary report for illness related deaths • Police Abstract for accident-related deaths • Grant of letters of administration or Grant of probate if there is no named beneficiary/ appointee/nominee • Additional document may be requested to assist in the assessment of the claim <p>After admission of liability by Jubilee Life the claimant will be required to provide the following additional documents:</p> <ol style="list-style-type: none"> 1. Claimant's Copy of ID 2. Claimant's KRA PIN 3. Signed Discharge Voucher 4. Claimants Bank Details (certified bank statement & completed EFT form) 	<ul style="list-style-type: none"> • Permanent Disability Notification (email or official letter) • A completed Claimant's claim form on Disability • Letter from the member's personal doctor confirming the member's disability claim form with details of disability • Independent opinion of JLL's appointed doctor to validate disability • Original Policy Document • Copy of ID • KRA PIN • Bank Details (certified bank statement & completed EFT form)
PERSONAL ACCIDENT (PA) DOCUMENTATION	ADULT ACCIDENT HOSPITALISATION RIDER (AAHR) & CHILD ACCIDENT HOSPITALISATION RIDER (CAHR) DOCUMENTATION
<ul style="list-style-type: none"> • Original invoices • Original receipts of payment • Original discharge summary from the hospital if hospitalised • Investigation reports including X- ray reports & films • PA claim form duly completed and signed • Copy of pay slip for the month of the accident • Sick off days given by the attending physician • Original Policy Document • Original police abstract if incident relates road traffic accident. • Copy of ID • KRA PIN • Bank Details (certified bank statement & completed EFT form) 	<ul style="list-style-type: none"> • Original invoices • Original receipts of payment • Original discharge summary • X- ray films and reports • Claim form duly completed and signed • Original Policy Document • Copy of ID • KRA PIN • Bank Details (certified bank statement & completed EFT form)
WAIVER OF PREMIUM (WOP) ON DISABILITY DOCUMENTATION	WAIVER OF PREMIUM (WOP) ON DEATH DOCUMENTATION
<ul style="list-style-type: none"> • All documentation required under disability claim 	<ul style="list-style-type: none"> • All documentation required under death claim

Withdrawal Process

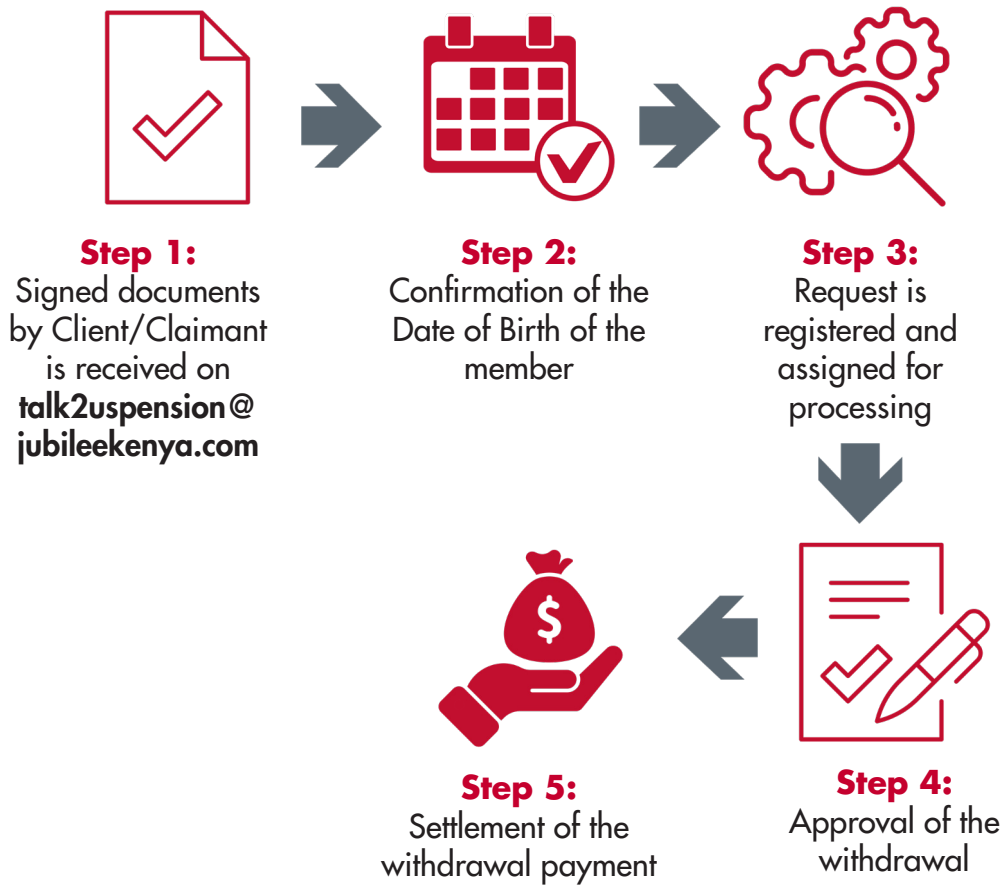


WITHDRAWAL DOCUMENTS

- Signed withdrawal forms by member
- Signed copy of the current year statement by member
- Transfer schedule for transferred amounts
- Copy of ID
- KRA PIN
- Bank Details (certified bank statement or copy of ATM card)

SECTION D: DISABILITY CLAIM AND DEATH

Process



DEATH CLAIM DOCUMENTATION	DISABILITY CLAIM DOCUMENTATION
<ul style="list-style-type: none"> • Signed Trustees' resolution • Permanent Disability Notification (email or official letter) • A completed Claimant's Letter • Member Certificate • Copy of ID • KRA PIN • Bank Details (certified bank statement & completed EFT form) 	<ul style="list-style-type: none"> • Signed Trustees' Resolution • A completed claimant's claim form on disability • Letter from the member's personal Doctor confirming the member's disability Claim form with details of disability • Member Certificate • Copy of ID • KRA PIN • Bank Details (certified bank statement & completed EFT form)

Jubilee

LIFE INSURANCE

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