

FuneralBond Direct Claim Form

Generation Life Investment Bonds - FuneralBond

How to make a claim

To make a claim you will need to provide a completed claim together with additional documentation.

STED -

Complete the claim form.

You should ensure that all relevant information requested on the form is provided and correct, including payment details to avoid delays.

The form must be signed and dated.

Remember to make a copy for your own records.

STEP 2

Documentation

Ensure you include any other documents requested such as a certified copy of the deceased's Death Certificate or certified copy of the Medical Certificate of Cause of Death.

Identification requirements

We are required to comply with the Anti-Money Laundering and Counter-Terrorism Financing Act 2006. This means we may also need identification documents from yourself depending on your role in the claim process or from anyone receiving a benefit payment.

Your identification may need to be verified before we can approve your claim request. We may decide to delay or refuse any request or transaction, including suspending a claim application if we're concerned that there may be a breach of our legal obligations.

We will require either a:

- Certified copy of your driver's license; or
- Certified copy of your passport (current or expired passport within the last 2 years).

Other forms of identification, may be accepted. please refer to the 'Completing proof of identity' document on our website.

STEP 3

Once you've completed the form, please email it, along with any required documentation to enquiry@genlife.com.au.

Alternatively, post the form and any required documentation to:

Generation Life

PO Box 263, Collins Street West

Melbourne VIC 8007

STEP 4

The processing of the claim will start once Generation Life ha received all required documents from all relevant parties. Generation Life will arrange for the sell down of all investments held within the FuneralBond and for proceeds to be made available for payment.

FuneralBond benefit payment claims generally take up to seven (7) Melbourne business days to be finalised and for payment to be made.

The timeframe may vary depending on the investment options held.

STEP 5

You will receive from us a confirmation when the claim process has been finalised.

The funds will be paid by Electronic Funds Transfer (EFT) to the nominated bank account.

Guide to completing this form

- This form is to be completed to make a FuneralBond claim.
- Please use BLACK/BLUE ink and complete the applicable sections in BLOCK LETTERS.

Required documents

Certified copies of the following documents are required			
Certified copy of Death Certificate			
OR			
Certified copy of Medical Certificate of Cause of Death			
Certified copies of the following identification documents a	re required		
Certified copy of your current driver's licence			
OR			
Certified copy of your passport (current or expired passp	oort within the last 2 y	ears)	
For other acceptable forms of identification, please refer to the	'Completing proof of i	dentity' document on	our website.
Deceased's details			
Personal details			
Tu			
Title			
Full given name(s)			
Surname			
Date of birth (dd/mm/yyyy)	Date of death (dd/m	m/yyyy)	
	/	/	
FuneralBond number			
Residential details			
Residential address (PO Box / RMB / Locked Bag is not accepted)			
Suburb/City/Town	Postcode	State	Country

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Contact person details Title Full given name(s) Surname Mobile number Phone number Phone number Email address Relationship to the deceased (select one) Executor Administrator Other (please specify) Residential address (PO Box / RMB / Locked Bag is not accepted) Suburb/City/Town Postcode State Country 3. Payment details 3.1 Nominated Australian financial institution information for this claim Please note that death benefit payment claims will generally take up to seven (7) Melbourne business days to be finalised once all required documentation is received. Note: Please complete Section 3.2 below if you would like to make a payment directly to the funeral director. Direct electronic funds transfer payment to the nominated account. Bank and branch name Account number	2.	Contact person submitting this form			
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3.2 Nominated Australian financial institution information for this claim

Please note that required docum	entation is received	1.							
Note: Please atta	ach evidence of funer	ral services supplied (e.g	J. invoice or receip	t).					
Pay th	he funeral director the	e amount of							
\$									
with the ba	lance paid to the non	minated account provided	d in Section 3.1 at	oove.					
Bank and branch	name								
Account name									
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Outthinking today.