

How to make a claim

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

STEP 1

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 has 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 are required

- ☐ Certified copy of your current driver's licence

OR

- ☐ Certified copy of your passport (current or expired passport within the last 2 years)

For other acceptable forms of identification, please refer to the 'Completing proof of identity' document on our website.

Certified copies of the following are required

- ☐ A copy of the receipt or tax invoice from the funeral director

1. Deceased's details**Personal details**

Title

Full given name(s)

Surname

Date of birth (dd/mm/yyyy)

 / /

Date of death (dd/mm/yyyy)

 / /

FuneralBond number

Residential details

Residential address (PO Box / RMB / Locked Bag is not accepted)

Suburb/City/Town

Postcode

State

Country

2. Contact person submitting this form

Contact person details

Title

Full given name(s)

Surname

Mobile 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 of the estate. Direct transfer payment cannot be made to any other third party.

Account holder name

BSB number

 -

Account number

3.2 Nominated Australian financial institution information for payment directly to the funeral director (optional)

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.

\$

with the balance paid to the nominated account provided in Section 3.1 above.

Account holder name

BSB number

-

Account number

4. Declaration and signatures

I do solemnly and sincerely declare that the foregoing particulars are true and correct in every detail and I agree that if I have made or in further declaration in respect of the said claim make any false or fraudulent statements or suppress, conceal or falsely state any material fact whatsoever, payment of my claim may be refused.

Name (please print)

Capacity/position

Signature

X

Date (dd/mm/yyyy)

/ /

If this form is signed under Power of Attorney the attorney certifies that he/she has not received notice of revocation of that power.

If your power of attorney has not previously been registered by us, we will require a certified copy of the power of attorney document as well as the appropriate proof of identification documents in accordance with the Anti-Money Laundering and Counter-Terrorism Financing Act 2006.

For acceptable forms of identification, please refer to the 'Completing proof of identity' document on our website.

You can submit this form by:

Email: enquiry@genlife.com.au

Mail: GPO Box 263, Collins Street West, Melbourne VIC 8007