

# Group life claim form for a death in service pension



Please complete this form if a spouse's/civil partner's and/or other dependant's pension is insured, either on its own or with a lump sum. If a pension is to be paid to more than one individual, please copy this form and insert the information for each one. If you are also making a claim for a lump sum benefit please also complete our Group Life claim form which is on our website.

In most cases we won't usually need to see the death certificate as we'll check the online register of deaths, but we will if the death occurred outside the UK or is the subject of a coroner's inquest which is still open (in the latter case, if the coroner issues an interim certificate this is an acceptable alternative to a death certificate).

We'll need to see:

- The marriage/civil partnership certificate if we're to pay to a spouse or civil partner
- The birth certificate if we're to pay to an adult dependent who isn't a spouse or civil partner or if we're to pay children.

In addition if the financial dependant is not the member's spouse, civil partner or child, the Trustees must also provide a copy of the evidence they've used to determine that this adult dependent is entitled to the pension (this will be provided by Zedra Governance Ltd if the scheme is within the Registered Group Life Master Trust).

If completing on-screen, please first save the form to your computer before entering any information to ensure you don't lose any inputs. Save and email the completed form to **groupclaims@protection.aviva.com**.

If completing by hand, please use black ink. The quickest way to send us the completed form is to scan and email it to **groupclaims@protection.aviva.com**.

Alternatively, it can be posted to us at:

Group Claims Team  
Aviva Life & Pensions UK Limited  
PO Box 12010  
Harlow  
CM20 9LG

When we receive the claim form, we'll check the basic details of the policy, such as ensuring the cover being claimed against is in force, and premiums are up to date. If there are any issues during this check that would delay a claim being paid, we'll contact you promptly.

If at any time you'd like to contact us about any aspect of the claim, you can call our Claims Team on 0330 303 9973 or email **groupclaims@protection.aviva.com**

## Section A - Policy and contact details

Policy (scheme) name	
Policy number	
Contact name	
Address for correspondence	
Telephone number(s)	
Email address	

## Section B - Member details

Title and full name	
National Insurance number	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>
Occupation	
Home address	
Date of birth	<input type="text"/> <input type="text"/> <input type="text"/>
Date of death	<input type="text"/> <input type="text"/> <input type="text"/>
Cause of death	

Place of death (town/postcode)

Location where last employed

Contract type (please tick)

Permanent

Temporary

Zero hour

Date employment started

<input type="text"/>	<input type="text"/>	<input type="text"/>
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Actual date of joining scheme

<input type="text"/>	<input type="text"/>	<input type="text"/>
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If there is a difference between the 'Date employment started' and 'Actual date of joining the scheme' please let us know why

Date last at work

<input type="text"/>	<input type="text"/>	<input type="text"/>
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Has this member had any absences lasting longer than one week in the past three years (including the period from the date last at work until the date of death)

Yes

No

If yes, please include details below:

Dates of absence from	To	Cause of absence
<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>

## Section C - Pension for spouse or dependant(s)

Title and full name of person to receive pension						
Relationship to the deceased						
Address						
Date of birth	<table border="1"><tr><td></td><td></td><td></td></tr></table>					
National Insurance number	<table border="1"><tr><td></td><td></td><td></td><td></td><td></td></tr></table>					
Deceased member's salary as per policy definition (£ p.a.)						
Amount of annual pension insured (£ p.a.)						

### Payee's bank account details for payment

Name of Bank/Building Society	
Branch address	
Account name	
Account number	
Sort code	

## Section D - Policyholder declaration - to be signed for all claims

I declare that the information given in this form is correct and the entitlement to the benefit being claimed is in accordance with the terms of the insurance contract(s).

Your name			
Date			
Signature			
Capacity in which you're signing (e.g. Director/HR manager)			

## Section E - Trust details

Name of Trust	
Telephone number	
Email address	
Address	

Is this a corporate trustee (the employer or professional trustee company)?  Yes  No

Or, does the trust have individually named trustees?  Yes  No

If you have ticked to say the Trust has individually named Trustees, please provide details of at least two named trustees. This information is required to perform money-laundering checks and the payment can't be made without these details.

Name 1			
Date of birth			

Address

Name 2

Date of birth

<input type="text"/>	<input type="text"/>	<input type="text"/>
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Address

## Data Protection

We're the data controller of personal data and will process personal data in order to undertake any activity to handle this claim. We may share personal data with:

- our reinsurers
- Aviva group companies
- our claims service providers
- our IT service providers
- our regulators and government agencies: the Financial Conduct Authority, and HM Revenue and Customs 'HMRC'
- the member's employer and/or their advisers.

Sometimes we, or third parties acting on our behalf, may need to transfer personal information to parties located in other countries that have data protection regimes that are different to those in the country where you're based, including countries which haven't been found to provide adequate protection for personal information by the UK Government. When making these transfers, we will take steps to ensure that your personal information is adequately protected and transferred in accordance with the requirements of data protection law. Further information regarding how we deal with personal data can be found on our website: [protection.aviva.com/privacy-policy](https://protection.aviva.com/privacy-policy)

## Support for the family

We can provide access to the following support for family members of the deceased:

### **Bereavement helpline**

Provides access to a completely confidential bereavement helpline designed to support people following the death of someone important to them. It provides support with managing anxiety and stress as well as access to therapy resources and referral to onward support. The service is available Monday to Friday 9am-5:30pm on 0204 579 8999 and select option 1.

### **Winston's Wish**

We're proud to work with Winston's Wish, a leading UK charity working to helping bereaved children get the specialist help they need when coping with grief. Information on the services Winston's Wish provide can be found at [www.winstonswish.org.uk](http://www.winstonswish.org.uk) and their helpline number is 0808 802 0021.

### **Probate helpline**

Our free-to-use probate helpline can help families understand the process for obtaining probate following a bereavement. Individuals have access to the telephone helpline, available Monday to Friday 9am-5:30pm, to provide them with support and guidance to navigate the potentially tricky legal, financial and tax issues resulting from a death. The service can be contacted on 0204 587 0494.

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