

# Claim Form - Life Insurance Plan

**IMPORTANT:** "Statement of Claimant" must be completed in all cases. If there are two or more beneficiaries or other claimants, each beneficiary must complete a "Statement of Claimant". Each beneficiary must make a separate statement.

## Statement of Claimant

POLICY NUMBER(S): \_\_\_\_\_

### 1 Decedent Information - *(Please print in ink or type)*

Name	First	Middle	Last		
Residence at time of death	Street		City	State	Zip
Date of Birth	Place of Death				
Date of Death	Cause of Death			Manner of Death	

### 2 Beneficiary or Claimant Information

Name	First	Middle	Last	Social Security Number/Tax ID Number	
Residence	Street		City	State	Zip
Date of Birth	Day Time Telephone			Relationship to Deceased	

Are you subject to back-up withholding? (Has the IRS contacted you directly to inform you that you are subject to back-up withholding?)  
 Yes       No

In what capacity or title do you Claim this Insurance? Check one:

- Beneficiary     
  Assignee     
  Trustee     
  Executor/Administrator     
  Guardian  
 Other

### 3 Statement of Lost Policy *(Complete only if policy is unavailable for return)*

I am unable to locate the original life insurance policy. I agree to return the policy to the company if found.

**4** Payment of Fund - Please Select One

Single Sum Payment

*(If the proceeds are to be paid as one settlement, payment will be made under the Fidelity Life Immediate Convenience Account, if eligible.)*

Installment Payments *(Please refer to the policy for options. If policy is not available, please contact our office.)*

Installment Option Elected \_\_\_\_\_

Payment Frequency:  Monthly  Quarterly  Semi-Annually  Annually

**5** Signatures

The undersigned hereby makes claim to said insurance (or contractual portion thereof, if more than one claimant) and agrees that the furnishing of this form or any of the forms supplemental thereto by the Company shall not constitute nor be considered an admission by it that there was any insurance in force on the life in question nor a waiver of any of its rights or defenses.

**Any person who knowingly and with intent to defraud any insurance company or any other person files an application for insurance or statement of claim containing any materially false information or conceals for the purpose of misleading, information concerning any fact material thereto commits a fraudulent insurance act, which is a crime and subjects such person to criminal and civil penalties.**

**Notice to California Residents**

For your protection California law requires the following to appear on this form:

Any person who knowingly presents a false or fraudulent claim for the payment of a loss is guilty of a crime and may be subject to fines and confinement in state prison.

**Information Authorization**

Any physician, medical practitioner, hospital, clinic or other medically related facility, insurance company, the Medical Information Bureau or other organization, institution or person, that has any records or knowledge about the insured is hereby authorized to disclose any such information. A photographic copy of this authorization shall be as valid as the original. (This information will only be obtained for contestable claims.)

“Under the penalties of perjury, I certify that the information supplied on this form is true, correct and complete.”

Claimant Signature	Date	Agent Signature	Date
Please Print Name	Please Print Name		
		Agent Number	

**Notary**

State of \_\_\_\_\_

County of \_\_\_\_\_ }SS.

Date: \_\_\_\_\_, personally appeared before me at \_\_\_\_\_,

State of \_\_\_\_\_, the above Claimant, who is known to me and who subscribed the foregoing statement before me and stated under oath that the statements and answers above made and subscribed are true and full.

In Witness Whereof, I have hereunto subscribed my name and affixed my official seal.

*(Seal)*

My Commission Expires: \_\_\_\_\_

Notary Public