

DEATH CLAIM FORM (FORM- A)

Please accept our condolences on your untimely loss. We understand that this is a difficult time for you and it is our responsibility to offer you the best support in this hour of need. This Death Claim Application form is designed to help you file your claim quickly and easily. Please return this form duly filled and signed with appropriate documents and follow below instructions to help us settle your claim faster.

IMPORTANT INFORMATION

- Claims under multiple policies may be registered by filling a single form & providing all applicable policy numbers.
- Claim is payable subject to the policy being in force on the date of event and fulfillment of all terms and conditions of the policy.
- If there is more than one claimant, separate forms need to be filled for each of the claimant.
- This form needs to be witnessed by any of the following (1) Max Life Agent (2) Sales Manager/ ADM/Office Head of Max Life (3) Block Development Officer (4) A bank manager of a nationalized bank with rubber stamp (5) An officer of Max Life company not below the rank of a manager (6) A Gazetted Officer (7) A Head Master / Principal of Govt. School (8) A Magistrate.
- Please read the declarations carefully and sign the claim form in the same manner as you would normally sign your cheques. Your signature would be used to verify the requests you give us in the future.

HOW TO COMPLETE YOUR FORM

All fields in the claim form should be filled by the claimant in BLOCK letters.

Section A – This section seeks information about the claimant:

- Please make sure that your current address and mobile number is mentioned, as we would do all the claims communication on this address and mobile number only, please provide your email-id in case you have one;
- Please mention your complete bank account details; and
- Please attach a NEFT Form attested by bank or a copy of cancelled cheque/bank account passbook to enable us to transfer the claim proceeds directly to your account subject to the claim being payable as per the terms and conditions of the policy.

Section B – This section seeks information about the Life Insured:

- Please mention the cause, date and time of death of the Life Insured;
- Please mention the names, addresses and telephone numbers of all doctors, hospitals or other medical sources who treated Life Insured during the last illness/accident and over the last three (3) years. If necessary, please attach additional sheets; and
- Please provide details of all life insurance policies of the Life Insured, with insurance companies other than Max Life Insurance.

Section C – This section needs to be filled only if different death benefit options are provided under the plans as mentioned in the form.

Section D – This section can be used, if you want to provide any additional information that is not covered in the claim form.

You need to submit the following documents along with this claim form (Please tick appropriate boxes to indicate documents that have been submitted) – [Marked with * are mandatory documents]

1) *Original / Attested Copy of Death Certificate issued by local authorities

2) *Original Policy Document(s)

3) *Attested copy of your identity proof (any one of the below- specifying your complete date of birth)

- | | |
|---|--|
| <input type="checkbox"/> PAN Card | <input type="checkbox"/> Voter ID Card |
| <input type="checkbox"/> Aadhaar Card | <input type="checkbox"/> Valid Driving License |
| <input type="checkbox"/> Valid Passport | <input type="checkbox"/> Others (please specify) _____ |

4) *Bank details (any one of the below)

- Cancelled cheque with printed name and account details of Claimant
- Attested passbook copy of bank
- NEFT form attested by bank

Additional documents in case of Suicide / Accident - (FIR and Post Mortem Report is mandatory)

- | | |
|--|--|
| <input type="checkbox"/> *FIR | <input type="checkbox"/> Panchanama |
| <input type="checkbox"/> *Post Mortem Report | <input type="checkbox"/> News paper cutting (if any) |
| <input type="checkbox"/> Inquest report | <input type="checkbox"/> Final Police Investigation report |

In case of Medical cause of death (Hospitalization / Non-Hospitalization) below documents are required

- Medical cause of death certificate
- Attendant Physician Statement (FORM "C" to be filled by last attending doctor)
- All Medical records (diagnosis, treatment and discharge/death summary) – if applicable

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C: You need to complete this section only if you are claiming benefits under any of the following plans: (Selecting the option does not confirm the admissibility of the claim.)

- | | | |
|---|--|--|
| 1) Max Life Guaranteed Income Plan: | <input type="checkbox"/> Lump sum benefit | <input type="checkbox"/> Regular Monthly Income |
| 2) Max Life Guaranteed Monthly Income Plan: | <input type="checkbox"/> Lump sum benefit | <input type="checkbox"/> Regular Monthly Income |
| 3) Max Life Super Term Plan: | <input type="checkbox"/> Immediate 100 % Payment | <input type="checkbox"/> Immediate 50 % payment & 50 % as Monthly Income |
| 4) Max Life Forever Young Pension Plan: | | |
| | <input type="checkbox"/> Lump sum benefit | <input type="checkbox"/> New Annuity Plan |
| | | <input type="checkbox"/> New Pension Plan |
| 5) Max Life Future Genius Education Plan: | <input type="checkbox"/> Lump sum benefit | <input type="checkbox"/> Regular Monthly Income |

D : Notes – Any additional information you would like to mention:

Vernacular Declaration (If the claimant signs in vernacular or affixes thumb impression) : Declaration from the Witness / Declarant to certify that the contents of the form were explained to the claimant in vernacular and that he/she has affixed his/her signature /thumb impression hereto after fully understanding the same.

NEFT Declaration: I authorize insurer for direct / electronic transfer of money in my above mentioned bank account. Max Life Insurance Co. Ltd. shall not be held responsible in case of non credit of your bank account with/without assigning any reasons thereof or if the transaction is delayed or not effected at all for reasons of incomplete/incorrect information. Further, Max Life Insurance Co. Ltd. reserves the right to use any alternative payout option including demand draft/ payable at par cheque, if direct credit cannot be executed. Credit will be effected based solely on the claimant account number information provided by the claimant and the claimant name particulars will not be used thereof.

Signature / Left thumb impression of Claimant _____

Name of Claimant _____

Place: _____

Date:

Signature of Witness /Declarant _____


Name & address _____

Place : _____


Date:

DISCLAIMER


- Submission of claim form with documents does not assure admission of the liability.
- On assessment of documents submitted, Max Life reserves the right to call for additional documents.
- Any person who knowingly files a claim containing false or misleading information , or who conceals information with intent to defraud or mislead the Company or other person, may be guilty of felony or subject to other criminal and/or civil penalties as the case may be under the applicable law(s). The company reserves the right to take appropriate action against the said person.

 **Email**

 claims.support
 @maxlifeinsurance.com

 **Helpline**

 1800 200 5577
 9 AM - 9 PM | Mon - Sat

 **Max Life Insurance Co. Ltd.**

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