

Claims Check List

FSP Name:

DATE:

CONTACT PERSON:

TEL NO:

NUMBER OF FORMS ATTACHED:

IMPORTANT: Please ensure that ORIGINAL CERTIFIED DOCEMNTS are stored in a document storage facility in order for the documents to be submitted to Old Mutual Contact upon request

TRANSACTION	TICK √	FORMS ATTACHED
Documentation required when submitting a claim		
Applicable to all claims		The Claim Form must be fully completed and signed by the beneficiary Original Certified Copy of the Identity Document of the Principal Member
Only applicable if claimant is not a Principal Member		Original Certified Copy of the Identity Document of the Claimant Original Certified Copy of the Identity Document of the deceased Original Certified Copy of the Death Certificate – BI-5
Only applicable if a child is over the age of 21 years		Most recent Proof of Disability from a registered Medical Practitioner Most recent Proof of Study from a registered educational institution
Only applicable if a child is under the age of 18 years		Original Certified Copy of the Birth Certificate
Only applicable if the : ID submitted @ New Bus stage does not match the death certificate ID of the deceased cannot be traced Change of surname		Sworn Affidavit Original Certified Copy of Marriage Certificate.
Only applicable if death is unnatural		Medical/Police or Accident Report
Only applicable if claim submitted is older than 3 months		Motivational Letter from the FSP/Burial Society
Only applicable if ID no. differ or Name/Surname to death certificate due to changes on Home Affairs		Letter from Home Affairs Copy of the fully completed BI-1663
Only applicable if death was not certified by a medical doctor		Copy of the fully completed -1680
Only applicable if the claim is paid to the mortuary		Confirmation letter from Mortuary
Only applicable to confirm membership or continuation of cover		Latest consecutive 6-12 months premium receipt of end-member
Only applicable for the take on data (New Business)		Latest premium receipt of member (Latest consecutive 6-12 months depending on scheme requirement)
Additional Documentation Required when Old Mutual pay the Beneficiary		
Applicable if the claim is paid to the beneficiary		Certified ID copy of the beneficiary Latest Beneficiary Bank statement(not older than 3 months) showing the name of the account holder and account number of the beneficiary matching the Claim form
Additional Information Required when the Scheme paid the Beneficiary		
The beneficiary consent form must be fully completed indicating who the proceeds of the claim be paid to.		The Claim Form must be fully completed and signed by the Principal Member or beneficiary Copy of the Beneficiary bank statement matching the addendum Original Certified Copy of the Identity Document of the Beneficiary

NB* Certification should not be older than 3 months.



