Liberty Corporate - A division of Liberty Group Limited (Reg. No. 1957/002788/06)
an Insurer and an Authorised Financial Services Provider (Licence No. 2409)
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PO Box 2094, Johannesburg, 2000
t: +27 (0)11 558 2999 *f:* +27 (0)11 408 2158
e: lcb.customerservices@liberty.co.za (For Claim Documents) *e:* lc.serv@liberty.co.za (For IPP Claim Documents)
e: lcdeathclaims@liberty.co.za (For Queries) *w:* www.liberty.co.za

Liberty Corporate Family benefit claim form (Member death, Spouse's death, child's death)

We are required in terms of various laws and for contractual purposes to share, collect and process your Personal Information (PI). Your PI is collected and processed by our colleagues, representatives or sub-contractors and we make every effort to protect and secure your PI. You are entitled at any time to request access to the information Liberty has collected, processed and shared.

Please note, field marked with an asterisk (*) are compulsory and claims cannot be processed without this information.

SEND THE COMPLETED FORM TO LIBERTY ON THE DETAILS BELOW:

- For all the Liberty Corporates Claims, please email the form to lcb.customerservice@liberty.co.za
- For IPP Claims, please email the form to lc.serv@liberty.co.za

Section 1 - Member details

Fund name _____ Fund number *

Employer name _____ Employer's contact number _____

Member's ID number * Membership number *

Member's full name (as per ID document): Surname _____ Employee/payroll number _____

Forenames _____

Next of kin

Contact name _____ ID number _____

Contact number _____ Relationship to deceased _____

Email address _____

Family contact

Contact name _____ *ID number* _____

Contact number _____ Relationship to deceased _____

Email address _____

Section 2 - Deceased details- Funeral

Full names (if not the member): Surname _____

Forenames _____

Cause of death _____ Date of death _____

Relationship to member (if not the member), please tick the applicable block: ☐ Child ☐ Member ☐ Spouse

If the member is claiming for the Extended family member on IPP, please indicate the relationship

☐ 0 – 5 years ☐ 6 – 13 years ☐ 14 – 20 years

☐ 21 – 25 years studying (proof required) ☐ Over 21 years handicapped (proof required)

Please clearly indicate with an X who should be refunded

***PAY** ☐ Beneficiary ☐ Member ☐ Estate

Name of account holder *

Where a refund is to the beneficiary; Relationship to the deceased * _____ *ID no. _____

Name of bank _____ (attach certified ID copy) Contact no. _____

Name of branch * Branch number *

Account number * Type of account *

NOTE: Payment made to beneficiaries may take longer to process due to verification done on their bank accounts.
It is advisable to use South African bank account as payment to foreign bank account might take longer due to verification

Section 3 - Spouse's death benefit (please complete only if this benefit is offered on this fund)

Forenames _____ Surname _____

Date of birth _____ Date of death _____

Section 3.1 - Payee's bank details – Spouse's death benefit (please complete only if this benefit is offered on this fund)

Only payable to the main member

Name of account holder _____

Name of bank _____

Name of branch _____ Branch number _____

Account number _____ Type of account _____

NOTE: Payment made to beneficiaries may take longer to process due to verification done on their bank accounts.
It is advisable to use South African bank account as payment to foreign bank account might take longer due to verification

Section 4 - Documentary requirements

- Copy of member's passport or identity document/copy of the front and back of the ID smart card. ☐ ENCLOSED
- Copy of deceased identity document or birth certificate. ☐ ENCLOSED
- Certified computerised copy of death certificate. ☐ ENCLOSED
- Certified proof of relationship, i.e. abridged birth certificate, marriage certificate or an affidavit from the deceased's biological relatives, signed in the presence of a commissioner of oaths. ☐ ENCLOSED
- Proof of registration of child aged 21-25 years and still studying. ☐ ENCLOSED
- Proof of full doctor's report or disability grant for child over 21 years and incapacitated. ☐ ENCLOSED
- Certified copy of payee's ID. ☐ ENCLOSED
- If it's still born, in the absence of death certificate we require the medical letter confirming death ☐ ENCLOSED
- For spouse, in the absence of marriage certificate, lobola/magadi letter, the claim to be accompanied by other proof of relationship from the deceased's blood relatives i.e., affidavit, member nomination form, medical aid list of dependents ☐ ENCLOSED
- A bank account statement must be attached for verification purposes, otherwise processing could be delayed. ☐ ENCLOSED
- Signed nomination of beneficiary form or in the absence of a nomination form will pay to the deceased's estate in which case we require a letter of Executorship issued by the Master of the High Court indicating the details of the Executor, a certified ID copy of the Executor and Estate bank account details. If the deceased's assets are less than R250 000.00 we require a letter of authority issued by the Master of the High Court indicating the details of the authorised person, a certified ID copy of the authorised person, written instructions from the authorised person indicating where and how to pay the benefit and the relevant bank account details. ☐ ENCLOSED

Section 5 - Employer's declaration

It is declared that the member commenced employment on * and was actively in our service at the date benefits are claimed, and that the deceased satisfied the conditions to be an eligible member/spouse/child as the case may be. We hereby declare that the above information and answers are true and correct.

_____ _____

Employer's signature * Date

Disclaimer

FICA

- The Financial Intelligence Centre Act ("FICA") requires Liberty to comply with certain requirements when processing the service request, you require. These requirements are listed below, and the acceptable verification documentation is specified where applicable.
- In order to identify and verify our clients, please ensure that all FICA documentation submitted is clear and legible.
- In terms of Section 11(1)(c) of the Protection of Personal Information Act, 4 of 2013 ("PoPIA"), Personal Information (PI) may be processed if processing complies with an obligation imposed by law on the responsible party.
- Liberty is obligated in terms of FICA to ensure compliance with the Customer Due Diligence obligation, as such a request for the FICA documentation and processing thereof satisfies the requirements of Section 11(1)(c) of PoPIA.
- Your PI is collected and processed by our staff, representatives or sub-contractors and we make every effort to protect and secure your PI. You are entitled at any time to request access to the information Liberty has collected and processed.

You have a say in how Liberty Group Limited (Liberty) uses your Personal Information (PI). Please note that Liberty complies with the principles as set out in the Protection of Personal Information Act, 4 of 2013 (POPIA). You, therefore, authorise us to collect, record, store and process your PI including special PI to assess and process this claim. Where you provide us with PI of any third party, which includes a minor, you hereby warrant that you have the necessary authority to provide such minor's PI and that, further, you have the consent of the person who's PI you have provided to us in this form. Your claim will be assessed and processed by our staff and representatives, which includes but is not limited to, independent financial advisors and Liberty tied agents. Please note that our staff and representatives have undergone POPIA training to ensure that your PI is secured and appropriately handled.

To assess and process your claim we may be required to share the PI you have provided to us and special PI with contracted third-party service providers in South Africa and internationally who are legally bound and required to comply with POPIA. Liberty will ensure that all our contracted third-party service providers agree to our privacy policies. You therefore authorise Liberty to share the PI you have provided to us with our contracted third-party service providers to amongst other things, validate and supplement the information you have provided to us. Liberty may further be required to share the PI you have provided to us as an obligation by law (e.g. with the South African Revenue Service ("SARS"), or South African Police Service ("SAPS")).

Please note that you and any third party whose PI you have provided may access the PI we have on record, and you and such third party have the right to and may ask us. to update, rectify, object to us using this PI except when we need it to conclude transactions with you or process your claim and request us to delete this PI and special PI if we are no longer legally required to keep it.

Contact us

Our service level agreement for the payment of funeral claims **is 2 working days**. Please **ONLY** contact us if you have not received payment within this timeframe.

Note:
Should Liberty be prevented from carrying out any of its obligations in terms of this claim because of things beyond Liberty's control ("Force Majeure"), Liberty will notify the Member of the circumstances and nature of the Force Majeure as well as the estimated duration and extent to which Liberty's performance is made impossible.

Under such circumstances, Liberty's obligations under the claim will be suspended until the circumstances causing the Force Majeure ends and Liberty will not be liable to the Member for any damages whatsoever caused to the Member due to Liberty's inability to perform its obligations in terms of the claim.

Force Majeure includes, acts of God, acts of the State or Government, total national electricity failure, exceptionally adverse natural disasters, weather conditions, riot, insurrection, sanctions, sabotage, terrorism, political or civil disturbance, war, boycotts, embargo, strikes, lock-out, shortages of labour or materials, material delays in public transport or any similar circumstances beyond the reasonable control of Liberty.

Queries

For more information, please contact your accredited Liberty financial adviser, or the Liberty Corporate support centre:
Contact centre
Tel.: +27 (0)11 558 2999
Fax: +27 (0)11 408 2264
Email address: lc.contact@liberty.co.za
Alternatively, you can write to us or visit our walk-in centre in Johannesburg.
For all other queries, please send them to lcdeathclaims@liberty.co.za

Contact Centre – Postal address	OR	Walk-in Centre address
Liberty Corporate P O Box 2094 Johannesburg 2000		**Libridge Building – 9th floor** 25 Ameshoff Street Braamfontein Johannesburg

Complaints

If your query, or issues that arise from it, are not resolved to your satisfaction by your financial adviser or our servicing staff within a mutually agreed timeframe, please lodge a complaint to us by accessing our complaints form on http://www.liberty.co.za/Pages/contact-us.aspx.

Alternatively, you may submit your complaint, in writing to:

The Complaints Resolution Manager	OR	Liberty Information Officer
Liberty Corporate P O Box 2094, Johannesburg, 2000 Email address: contactlcb@liberty.co.za Tel number: +27 (0)11 408 2771 Fax number: +27 (0)11 408 4440		**Liberty Corporate** P O Box 2094, Johannesburg, 2000 Email address: privacy@liberty.co.za Fax number : +27 (0)11 558 3911

If the complaint is not resolved to your satisfaction by Liberty, you may contact one of the legislative bodies that have been tasked to look after your interests a customer. Please note that if a complaint is formally logged with Liberty Corporate using our complaints process, a reference number will be provided.

Fund complaints

The Principal Officer
The Principal Officer is responsible and accountable for the day-to-day affairs of the Fund. If you have any unresolved complaints regarding the running of the fund, you may contact the Principal Officer of your fund details are available from your Administrator.

The Pension Funds Adjudicator
If you have any unresolved complaints about your **corporate fund** (pension, provident or preservation fund) that are subject to the jurisdiction of the Pension Funds Act 24 of 1956, you may contact the Pension Funds Adjudicator at:

P O Box 580, Menlyn, 0063
Email address enquiries@pfa.co.za
Tel. number +27 (0)12 748 4000
Fax number 086 693 7472

The Information Regulator
The Information Regulator is, among others, empowered to monitor and enforce compliance by public and private bodies with the provisions of the POPIA Act.

P.O Box 31533, Braamfontein, 2017
Complaints email address: complaints.IR@justice.gov.za
General enquiries email address: inforeg@justice.gov.za

The Ombudsman for Long-term Insurance

If you have any unresolved complaints about a long-term insurance policy (death, disability, dread disease, etc.) that is subject to the jurisdiction of the Long-term Insurance Act 52 of 1998, you may contact the Long-term Insurance Ombudsman at:

Private Bag X45, Claremont, 7735
Email address: info@ombud.co.za
Tel. number: +27 (0)21 657 5000
Sharecall: +27 (0)86 010 3236
Fax: +27 (0)21 674 0951

Complaints against a financial adviser

The FAIS Ombudsman
If you have any unresolved complaints or disputes about advice that was given to you by a financial adviser after 30 September 2004, contact the FAIS Ombudsman at:

PO Box 74571, Lynnwood Ridge, 0010
Email address: info@faisombud.co.za
Tel number: +27 (0)12 470 9080
Fax number: +27 (0)12 348 3447