



Liberty Corporate – A division of Liberty Group Limited Reg. No. 1957/002788/06
 An Authorised Financial Services Provider (Licence No. 2409)
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CLAIMS REQUIREMENTS MATRIX

At Liberty, we pledged to deliver quality customer service. At no stage is this more important than at the time of claim. To achieve this, it is essential that all the formalities are finalised and the necessary documentation be submitted to us as quickly as possible. To assist with this process, our normal requirements are reflected in the matrix below.

Documentation required	Death Claims	IPP claims/Dread disease	Capital disability claims	Retirements claims	Family benefits (Funeral cover)
Notification form (signed by the authorised signature of the fund)	✓	✓	✓	✓	✓
Confidential Doctor's Report		✓	✓		
Employer's Statement (completed by the authorised signatory of the fund)		✓	✓		
Member's Statement (completed by the claimant)		✓	✓		
Job Description Questionnaire		✓	✓		
Form A & D			✓		
Certified copy of member's ID	✓	✓	✓	✓	✓
Certified copy of deceased's ID or birth certificate	✓				✓
Bank details or copy of the member's last payslip prior to the date of incapacity		✓	✓	✓	✓
Identification and declaration (if member cannot sign)		✓			
Police investigators report for unnatural death	✓				
Copy of certified computerised death certificate	✓				✓
Payment details in respect of minors: Trust details, banking details (Stand-Alone funds)	✓				
Copy of Nomination of Beneficiary form, identification of dependants.	✓				
Proof of age/financial dependency and relationship of spouse, any major or minor child entitled to benefits (copy of ID, marriage certificate, affidavit)	✓				
Attendees and sick leave reports	✓				
Trustees Resolution signed by two trustees of the fund reflecting the percentage split. Employers declaration of dependants and trustees details (Stand-Alone funds)	✓				
Proof of relationship if the deceased is a spouse or child	✓				✓
Proof age for the second annuitant (if applicable)				✓	
Details of the transferring details(pension fund)				✓	
Proof of relationship and if the child is over 21yrs proof that he/she was still at school or mentally disturbed					✓
Certified ID/ valid passport copy of the recipient of the funeral benefit					✓

Notes:

1. Please complete forms fully as blank items may result in the claim being delayed while the information is confirmed.
2. Occasionally, further information may be requested before a claim can be finalised.
3. For IPP Dread Disease and Capital Disability claims, all relevant reports from a doctor, e.g. X-rays, test results etc., must be attached. Independent medical evaluation may be requested.
4. If official documents to prove age or relationship are not available, please contact Liberty Corporate Benefits.
5. A certified copy of the registered trust deed is required where the benefit payable to a trust in respect of a minor for Stand-Alone funds only.
6. For death claims, if the member deceased in the first year of joining the company/scheme attendance and sick leave records from date of commencement of the scheme may be requested.
7. Written confirmation that the deceased estate is solvent is required from the executor of the estate or an authorised signatory of the scheme, before payment can be made to a nominated beneficiary.
8. Where payment will be made by Liberty Corporate Benefits by means of an electronic fund transfer (EFT), proof of bank details are required.

Please note that in the event of any modification or variation of this standard form Liberty will regard this form as being invalid and of no force and effect. **Do not sign blank or incomplete forms.**