

## 1 Policy number(s)


## 2 Deceased life assured

We explain 'life assured' in section 3 of 'Answers to questions about claiming death benefit'.

First name and surname of deceased life assured in CAPITAL LETTERS

Date of death

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## 3 Policyholder

We explain 'policyholder' in section 3 of 'Answers to questions about claiming death benefit'. Please use CAPITAL LETTERS

Title. Please tick or write in the 'Other' box

Mr  Mrs  Miss  Ms  Other

Full name

Address



Postcode

Daytime telephone number in case we have any questions

Has the policyholder died? Please tick

YES

Please go to section 4

NO

The policyholder must claim the death benefit. Please go to section 5

## 4 If the policyholder has died

a Please tick one box only in either (i), (ii), (iii) or (iv). Then write your details in (b) on the next page.

- i. Please tick here if a grant of probate has been obtained and you are an appointed executor. We explain 'grant of probate' in section 3 of 'Answers to questions about claiming death benefit'.
- ii. Please tick here if letters of administration have been obtained and you are the appointed administrator. We explain 'letters of administration' in section 3 of 'Answers to questions about claiming death benefit'.
- iii. Please tick here if a grant of probate has **not** yet been obtained and you are an executor named in the deceased policyholder's last, signed will.
- iv. If the deceased policyholder did not leave a signed will, their next of kin (husband, wife, civil partner or blood relative over 18) must claim the death benefit. This list shows the order in which they are entitled to claim. Please tick one box only to show how you were related to the deceased policyholder. If you were not related in one of the ways we've listed, write your relationship in the 'Other blood relative' box in CAPITAL LETTERS.

1. Husband, wife or civil partner

5. Parent

9. Uncle or aunt

2. Child (not stepchild)

6. Brother or sister

10. Cousin

3. Grandchild

7. Grandparent

11. Other blood relative

4. Great grandchild

8. Nephew or niece

**b** The deceased policyholder's executor, administrator or next of kin **who completed section (A) on the previous page** should write their details here in CAPITAL LETTERS.

Title. Please tick or write it in the 'Other' box  
Mr  Mrs  Miss  Ms  Other

Full name

Address

Postcode

Daytime telephone number in case we have any questions

**Please go to section 5**

## 5 Payment

We can only pay by cheque and will pay the person claiming the death benefit. If you don't have a bank account, we can pay the cheque to someone else.

**Do you want us to pay the cheque to someone else? Please tick.**

YES  NO

▼ ▼

**Please go to section 5a**      **Please go to section 6**

### 5a If you want us to pay someone else

Please sign here if you want us to pay the death benefit to someone else.

The person you want us to pay must read section 8 of 'Answers to questions about claiming death benefit' and sign in the box below to let us check their identity.

**Details of the person you want us to pay** in CAPITAL LETTERS

Title. Please tick or write it in the 'Other' box  
Mr  Mrs  Miss  Ms  Other

Full name

Address

Postcode

Date of birth D  M  Y

Signature of person you want us to pay

Date D  M  Y

**Please go to section 6**

## 6 Declaration

I claim the death benefit of policy number(s) on page 1 and declare that:

- I am (please tick):  
the policyholder named in section 3   
OR  
the person named in section 4b
- all the details on this form are true and complete
- I am legally entitled to the death benefit
- I am over 18
- I understand that you will check my identity and I have read section 8 of 'Answers to questions about claiming death benefit'
- I will sign a receipt for the death benefit if you ask me
- I will pay any share of the death benefit due to anyone else entitled to it.

Signature

Date D  M  Y

## 7 Documents to send with this form

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Please tick which of the following documents you are sending with this form.

- The original death certificate. We will return this.
- The original policy document. We will keep this.
- A photocopy of the policyholder's last, signed will if they have died and left one. We will keep this.
- The sealed original of the grant of probate or letters of administration if one of these has already been obtained. We will return this. If one of these has not yet been obtained, we may ask you to send one of them later before we can pay the death benefit.

If any original policy document has been lost, please write the policy number here. You can still claim the death benefit of a policy even if you don't have the original policy document. If you don't know the policy number(s) please write 'not known' here.


## 8 Data Protection Act 1998

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We will use the information you supply on this form to process your claim, administer any Royal London policy that you may have and ensure our records are correct.

To carry out our business effectively, we may pass the personal information that we hold on you to the following third parties in the European Economic Area: our regulator, auditors, authorised agents and third party service providers. However, we will not pass your personal information to companies outside the Royal London Group unless we have your permission, are required to by law or have to in order to provide the services required.

You can ask us for a copy of the personal information we hold on you, for which we are allowed to charge a small fee. If you want to do this, please write to: The Data Protection Officer, Royal London, Royal London House, Alderley Road, WILMSLOW, SK9 1PF.

## 9 Help

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If you need help completing this form, please read 'Answers to questions about claiming death benefit'. If you need further help, please call us on 08450 502020 between 8am and 6pm Monday to Friday, except bank holidays.

## 10 Sending us this form

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Please send this form to:

Royal London Plus  
Royal London House  
Alderley Road  
WILMSLOW  
SK9 1PF

If you would like a copy of this form in large print,  
please call us on 08450 502020



### Royal London Plus

Royal London House, Alderley Road, Wilmslow, Cheshire, SK9 1PF, United Kingdom

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royallondonplus.co.uk

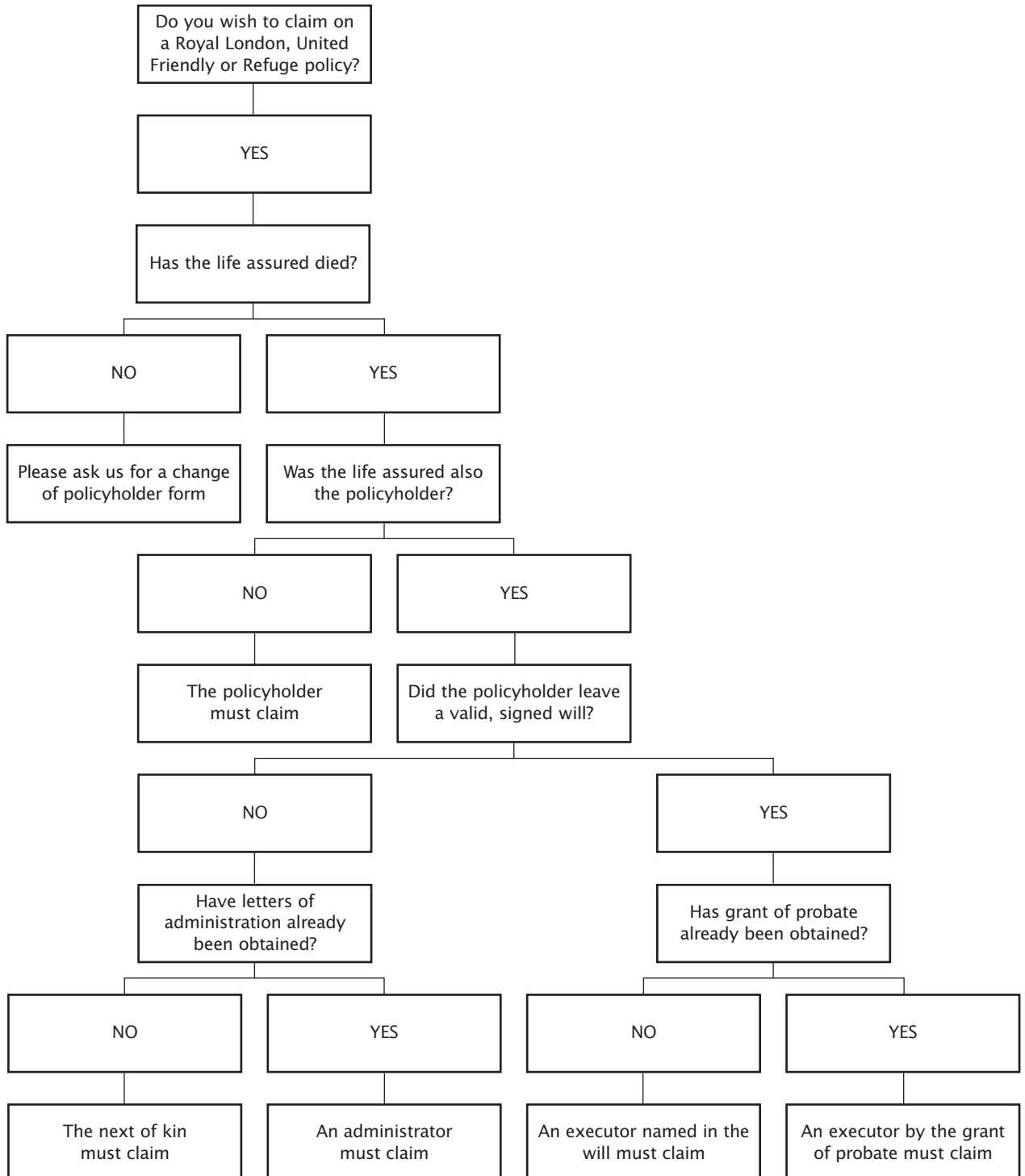
## 1 Policy numbers

- Before you send us the completed claim for death benefit form please:
- make a note of one of the policy numbers in case you need to call us with any questions
- make a note of the date that you send us the completed form
- keep this sheet.

D   M   Y

## 2 Who should claim?

This diagram shows who should claim. We explain some of the terms in the diagram in (3) on the next page.



### 3 Meanings of words

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**Life assured**

The person on whose death we will pay the death benefit.

**Policyholder**

The policy's owner. If they started the policy, they will be called the proposer on the policy document. In many cases, the life assured and the policyholder will be the same person.

**Grant of probate or letters of administration**

When a person dies, what they leave behind is called their estate. Other people have to assume responsibility for distributing the estate and need a grant of representation to do so. This is a document proving that they have authority to distribute the estate.

In England, Wales and Northern Ireland the two most common types of grant are:

- probate, where the deceased has left a valid will, and
- letters of administration, where the deceased has not left a valid will.

In Scotland the grant is a grant of confirmation.

**Executor**

The people distributing the estate of someone who has left a will are called executors and will have been appointed by the will maker.

**Administrator**

The people distributing the estate of someone who has not left a will are called administrators.

### 4 How do I apply for a grant of probate or letters of administration?

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To apply for a grant of probate or letters of administration (see question 3) the people distributing the estate must ask their local probate office for an application form. You can find your local office by calling the Probate & Inheritance Tax helpline on 0845 302 0900 between 9am and 5pm Monday to Friday or visiting [www.hmrc.gov.uk/cto/iht.htm](http://www.hmrc.gov.uk/cto/iht.htm)

### 5 Why do you need to see the will?

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If the policyholder has died and left a will, we need to check that it is signed and we are paying an executor named in it.

### 6 What do I do if I am waiting for an inquest?

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If you can't send us the death certificate because you are waiting for an inquest, you can send us a coroner's interim death certificate (which we will return) provided this shows:

- the cause of death and
- either the deceased's date of birth or age at death. If it does not show either of these, please also send us the deceased's birth certificate.

We will contact you if you still need to send us the original death certificate before we can pay the death benefit.

### 7 What do I do if I need the claim value to apply for grant of probate?

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If you need the value to apply for a grant of probate, please complete the claim for death benefit form and send it to us with the documents we ask for in section 7 of the form.

### 8 Will you check my identity?

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We will carry out identity authentication checks to verify the identity of anyone signing the claim for death benefit form. This involves checking the details you supply against those held on any databases that may be accessed by the reputable third party company that carries out our checks. This includes information from the electoral register and fraud prevention agencies. A record of this search will be kept and may be used when other companies verify the identity of anyone signing the claim for death benefit form.

### 9 Will you pay the death benefit for several policies with one cheque?

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You can use the claim for death benefit form to claim on policies started with Royal London, United Friendly and Refuge. If you are claiming on several policies from one of these companies, we will send you one cheque. If you are claiming on policies from two or more of these companies, we may send you two cheques and these may arrive at different times.

### 10 When will you return the death certificate?

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We will return the death certificate with your cheque. If you are claiming on policies started with two or more of Royal London, United Friendly or Refuge, the death certificate may arrive with your second cheque, not your first.

If you would like a copy of this document in large print,  
please call us on 08450 502020



**Royal London Plus**

Royal London House, Alderley Road, Wilmslow, Cheshire, SK9 1PF, United Kingdom

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