

# Group Life Insurance

## Master Trust and Excepted Solution Family information form



### Why am I being asked to complete this form?

This form should be completed for all claims under the Canada Life Group Life Master Trust or Excepted Solution Trust and Rules where Trustees Solutions Limited ("the Trustee") is the sole Trustee.

The completion of this form is requested in order to provide the Trustee with information about the deceased member and their personal circumstances. This information will be used to assist the Trustee in deciding to who and in what proportions any benefits should be paid.

The completed form will be sent to the Trustee, who may contact the individuals for whom information has been provided, as part of their decision.

### If you have any questions

Visit



<http://documents.canadalife.co.uk/life-claims-guide-gla-how-it-works.pdf>



### Who should complete this form?

This form should be completed by whoever has sufficient information to complete all questions, such as the member's next of kin, the deceased's employer, or the legal personal representatives looking after the estate.

We may return the form if any information has been left out. If information is to follow, please mark this as 'To be advised'.

## How to return your form

### By post

Life Claims Team,  
Canada Life Limited, 3 Rivergate,  
Temple Quay, Bristol BS1 6ER.



Please return the completed form.

### By email

grouplifeclaims  
@canadalife.co.uk



Scanned or photographed images of the completed form can be emailed.

### Call us

0117 916 4460



If you have any questions regarding the completion of the form or the submission process, please call us.

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#### 1 Canada Life policy details

Employing company

Policy number

#### 2 Deceased member's details – please fully complete for all claims

Title Full name of member

Date of birth (day, month, year)

Date of death (day, month, year)

National Insurance Number

Is an expression of wish form available? If 'Yes' please provide a copy.

Yes

No

Did the member leave a will?

A copy of the member's will or a copy of Grant of Probate/Letters of Administration should be provided, if available.

Yes

No

**Note:** A copy of the Death Certificate is required if this has not already been provided.

#### 3 Representative's details – (Personal representative administering the estate and any other party)

Personal representative's full name

Address

Postcode

Telephone number

E-mail address

Relationship to deceased member

Solicitor or other party (please state capacity)

Address

Postcode

Telephone number

E-mail address

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#### 4 Details of spouse/civil partner/partner

Does the deceased have a surviving spouse, civil partner or partner?

Yes

No

If 'Yes' complete this section. Note – Proof of relationship may be required.

Full name

Relationship to deceased member

Address

Postcode

Telephone number

E-mail address

#### 5 Details of children

Does the deceased have any surviving children?

Yes

No

If 'Yes' complete this section. Note – Proof of relationship may be required.

Full name

**Marital status**

Married

Single

Date of birth (day, month, year)

 -  - 

**In full-time education**

Yes

No

**Lives at main family home**

Yes

No

Address

Postcode

Full name

**Marital status**

Married

Single

Date of birth (day, month, year)

 -  - 

**In full-time education**

Yes

No

**Lives at main family home**

Yes

No

Address

Postcode

Full name

**Marital status**

Married

Single

Date of birth (day, month, year)

 -  - 

**In full-time education**

Yes

No

**Lives at main family home**

Yes

No

Address

Postcode

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#### Details of dependant(s) (Any other person who was financially supported by the deceased)

Does the deceased leave any other financial dependants?

Yes

No

If 'Yes' complete this section. Note – Proof of relationship may be required.

Full name	<input type="text"/>
Address	<input type="text"/>
	Postcode
Date of birth (day, month, year)	<input type="text"/> - <input type="text"/> - <input type="text"/>
Relationship to deceased member	<input type="text"/>

Full name	<input type="text"/>
Address	<input type="text"/>
	Postcode
Date of birth (day, month, year)	<input type="text"/> - <input type="text"/> - <input type="text"/>
Relationship to deceased member	<input type="text"/>

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#### Details of other immediate family (e.g. parents, siblings etc.)

Does the deceased leave any other immediate family?

Yes

No

If 'Yes' complete this section. Note – Proof of relationship may be required.

Full name	<input type="text"/>
Address	<input type="text"/>
	Postcode
Date of birth (day, month, year)	<input type="text"/> - <input type="text"/> - <input type="text"/>
Relationship to deceased member	<input type="text"/>

Full name	<input type="text"/>
Address	<input type="text"/>
	Postcode
Date of birth (day, month, year)	<input type="text"/> - <input type="text"/> - <input type="text"/>
Relationship to deceased member	<input type="text"/>

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#### Details of other close relatives (e.g. uncle, aunt, niece, nephew, grandparent, grandchild)

Does the deceased leave any other close relatives?

If 'Yes' complete this section. Note – Proof of relationship may be required.

Yes

No

Full name	<input type="text"/>
Address	<input type="text"/>
	Postcode
Date of birth (day, month, year)	<input type="text"/> - <input type="text"/> - <input type="text"/>
Relationship to deceased member	<input type="text"/>

Full name	<input type="text"/>
Address	<input type="text"/>
	Postcode
Date of birth (day, month, year)	<input type="text"/> - <input type="text"/> - <input type="text"/>
Relationship to deceased member	<input type="text"/>

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#### Additional information

(Please enter any additional information you feel may be of help to the Trustees in reaching their decision)

# Group Life Insurance

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### 10 Support Services

### More than just a financial benefit

As part of your employee benefits package, we provide you with **free** access to the following Support Services:



#### Bereavement Counselling

Bereavement Counselling gives people time and space to talk about their feelings following a bereavement. It provides unlimited access to a 24/7 helpline and up to four sessions with a qualified counsellor.



#### Probate Helpline

The Probate helpline provides access to probate experts covering family disputes, validity of wills, power of attorney and obtaining probate. The Helpline is available Monday to Friday 8am to 8pm, except bank holidays.

#### How to access your support services



To find out how you can access the Bereavement Counselling Service and Probate Helpline please refer to page 10.

#### If you have any questions

Visit



[www.canadalife.co.uk/group-insurance/support-services](http://www.canadalife.co.uk/group-insurance/support-services)

# Group Life Insurance

## Master Trust and Excepted Solution

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## Data Protection Notice

Canada Life Limited (referred to as ‘**Canada Life**’, ‘**we**’, ‘**us**’ or ‘**our**’ in this DPN) takes its privacy obligations very seriously. Any personal information provided to us, as data controller, by a policyholder, joint policyholder, employer policyholder, trustee, insured person, beneficiary, claimant or member (referred to as ‘**you**’ or ‘**your**’ in this DPN), will be treated in accordance with the Data Protection Act 2018.

### Using personal information

We use personal information to undertake activities relating to the setting up, administration and renewal of our policies, products and services. This includes processing applications and handling any claims. For the majority of our business we will rely on the performance of our contractual arrangements with you as the legal basis for processing.

We do not use policyholder or member personal data for marketing purposes and we do not make your personal information available to third parties for the purpose of direct marketing.

The nature of our business is to provide investments, life and pensions cover, critical illness, income protection and employer related group products. To do this we need to use the personal information provided to carry out analysis of actuarial risks (risks of gains or losses), mortality and morbidity risks and pricing. This will be carried out in accordance with the Institute & Faculty of Actuaries’ data handling protocols.

We use underwriting software to process some applications and quotations which will use an element of automated decision making.

Exceptionally, we may rely on our legitimate interests to process your personal data. When we do, we will demonstrate compelling legitimate grounds for doing so.

#### For employer-related group insurance products

The Data Protection Act permits appropriate information about employees to be provided by an employer to an insurer without individual consent (including details of long-term absentees, current and previous claimants, and medical underwriting decisions).

For employer-related group products the Data Protection Act permits that members may individually withdraw their consent. In those instances Canada Life will be unable to provide cover for that individual.

When medically underwriting or assessing a claim we will obtain consent from the employee.

### Sharing personal information

We share personal information only on the basis of the purposes for which it was collected. This notice is intended to illustrate the instances where data may be shared. However, we will share your data only for the limited and compatible purposes for which it was originally obtained:

- with other Canada Life group companies including those outside the European Economic Area (EEA);

- with any of our service providers, reinsurers and/or regulators;
- with other insurers and government agencies, including without limitation Her Majesty’s Revenue and Customs (HMRC), Department of Work and Pensions (DWP);
- in order to prevent, detect or investigate financial crime including fraud or other criminal activity, we may share your data with other companies (including private investigators), organisations (including fraud prevention agencies and databases), public bodies (including the police) and associations and credit reference agencies;
- we will not share your medical information with anyone other than yourself without your consent except as described in the next bullet point. This includes your employer, spouse, other relatives, friends or your legal or financial adviser. In some circumstances, it may be appropriate to advise your employer about your medical information, for example, to recommend alternative supportive therapy. However, we will seek your consent in such circumstances;
- for employer-related products and services only, some medical information related to underwriting decisions and non-medical information about you necessary for lawful policy and claim administration purposes will be shared with your employer;
- we will not share non-medical information concerning you with your spouse, other relatives, friends or your legal or financial adviser unless you provide your consent to us in writing;
- for insurance related products, with your own doctor or relevant medical professionals; and/or
- in any circumstances if permitted or required to do so by law or if we have your consent to do so.

### International transfers

Given the global nature of our business, we use third party suppliers and outsourced services (including cloud based services), which can require transfers of personal information outside of the EEA. In doing so, we ensure that there are appropriate contractual arrangements and we will choose only those organisations with strict controls in place, via appropriate organisational and technical measures in place to protect your personal information.

### Retention of your personal data

We will keep your personal data only for so long as is necessary and for the purpose for which it was originally collected. In particular, for so long as there is any possibility that either you or we may wish to bring a legal claim under this insurance, or where we are required to keep your personal data due to legal or regulatory reasons.

## Your rights and contact details of the Information Commissioner’s Office (ICO)

#### You may have the right to require us to:

- provide you with further details on the use we make of your personal information or your special categories of data;
- provide you with a copy of the personal information that you have provided to us or which we hold;
- update any inaccuracies in the personal information we hold;
- delete any special category of data or personal information for which we no longer have lawful grounds to use;
- cease processing of your personal information that is based on consent, by withdrawing your consent to that particular processing;
- cease any processing based on legitimate interests grounds, unless our reasons for undertaking that processing outweigh any prejudice to your data protection rights; and
- restrict how we use your personal information whilst a complaint is being investigated.

In certain circumstances, we may need to restrict the rights listed above in order to safeguard the public interest (e.g. the prevention or detection of crime), our interests (e.g. the maintenance of our legal responsibilities) and for the performance of our contract with an employer who is the policyholder for employer-related products and services.

### Data Protection Officer (DPO)

If you have any questions, or complaints, in relation to our use of your personal information, you should first contact our DPO, on the details below:

**Canada Life Limited**  
**Canada Life Place, Potters Bar,**  
**Hertfordshire, EN6 5BA**  
**or by email at: [dpo@canadalife.co.uk](mailto:dpo@canadalife.co.uk).**

In the unlikely event that you are dissatisfied with our response, you have the right to take the matter up with the Information Commissioner’s Office (ICO), whose address is:

**Information Commissioner’s Office**  
**Wycliffe House, Water Lane,**  
**Wilmslow Cheshire, SK9 5AF**

The full version of our DPN can be found on our website, [www.canadalife.co.uk](http://www.canadalife.co.uk) or is available upon request by calling 0345 223 8000.

This DPN is dated 7th September 2018. Any future updates will be made available as described above.

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## Declaration and consent

By signing the declaration you confirm:

- that you agree to us using, processing and sharing the personal information (including special categories of personal data) provided to us for the purposes set out in the Data Protection Notice included on this form.
- This form has been completed to the best of my knowledge and belief

Full name

Address

  

Postcode

Relationship to deceased member

Telephone number

E-mail address

Signature

Date (day, month, year)

 -  - 

**Note:**

This form **must** be provided with a handwritten signature, but we can accept a scanned image of handwritten signatures.

## How to return your form

### By post

Life Claims Team,  
Canada Life Limited, 3 Rivergate,  
Temple Quay, Bristol BS1 6ER.



Please return the completed form.

### By email

grouplifeclaims  
@canadalife.co.uk



Scanned or photographed images of the completed form can be emailed.

### Call us

0117 916 4460°



If you have any questions regarding the completion of the form or the submission process, please call us.

Our forms are available to download from our website: [www.canadalife.co.uk/group](http://www.canadalife.co.uk/group)

Canada Life Limited, 3 Rivergate, Temple Quay, Bristol BS1 6ER. Telephone 0345 223 8000

Canada Life Limited, registered in England no. 973271. Registered Office: Canada Life Place, Potters Bar, Hertfordshire EN6 5BA. CLFIS (UK) Limited, registered in England no. 04356028 is an associate company of Canada Life Limited. Registered Office: Canada Life Place, Potters Bar, Hertfordshire EN6 5BA. Canada Life Limited is authorised by the Prudential Regulation Authority and regulated by the Financial Conduct Authority and the Prudential Regulation Authority.

GRP1206 – 720R(B)



## **Group Life Insurance**

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**The following page should be retained for your reference.**

# Group Life Insurance

## Support Services

### More than just a financial benefit

At Canada Life, we believe insurance is about much more than just a financial benefit. So we provide you with a comprehensive set of Support Services, included with your cover at no extra cost<sup>1</sup>.

### Bereavement Counselling



Bereavement Counselling gives people time and space to talk about their feelings following a bereavement. It provides unlimited access to a 24/7 helpline and up to four sessions with a qualified counsellor.

#### Who can use it?

+ Available to all UK-based employees of your company or the immediate family of a deceased member<sup>2</sup>

#### How to access?

Access the Bereavement Counselling service by calling 0800 912 0826 any time of the day or night.<sup>3</sup>  
You can also visit [www.canadalife.co.uk/group/bereavementcounselling](http://www.canadalife.co.uk/group/bereavementcounselling)

### Probate Helpline



The Probate helpline provides access to probate experts covering family disputes, validity of wills, power of attorney and obtaining probate. The Helpline is available Monday to Friday 8am to 8pm, except bank holidays.

#### Who can use it?

+ Available to all UK-based employees of your company or the immediate family of deceased member<sup>4</sup>

#### How to access?

Access the Probate Helpline service by calling 0808 164 3079<sup>5</sup>  
You can also visit [www.canadalife.co.uk/group-insurance/group-life-assurance/probate-helpline](http://www.canadalife.co.uk/group-insurance/group-life-assurance/probate-helpline)

**For full details of our Support Services please go to:**



[www.canadalife.co.uk/group-insurance/support-services](http://www.canadalife.co.uk/group-insurance/support-services)

1 Free for all service users as the Support Service costs are absorbed with the Group Life Insurance premium.

2 Spouse, partner, registered civil partner, parent, sibling, child over 16 or carer.

3 You will be asked which company you work for.

4 Immediate family includes any spouse, partner, registered civil partner, parent, sibling, child over 16 or carer. Also includes anyone dealing with the deceased member's estate.

5 You will be asked which company you work for.

### This page should be retained for your reference

Our forms are available to download from our website: [www.canadalife.co.uk/group](http://www.canadalife.co.uk/group)  
Canada Life Limited, 3 Rivergate, Temple Quay, Bristol BS1 6ER. Telephone 0345 223 8000

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