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## LIFE INSURANCE DEATH CLAIM

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We want to ensure you receive your benefit payment promptly, so please complete the applicable sections and be sure to enclose the documentation requested. Each named beneficiary will need to complete a separate claim form. **Please refer to page 7 to ensure that all sections have been completed and all documentation is included prior to mailing. Please type or print clearly to avoid any delays in processing.**

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### SECTION 1: ABOUT THE DECEASED

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Name: \_\_\_\_\_  
FIRST MIDDLE LAST

Contract Number(s) you are claiming benefits for: \_\_\_\_\_

Social Security Number: \_\_\_\_\_ Date of Birth: \_\_\_\_\_

Street Address: \_\_\_\_\_

City: \_\_\_\_\_ State: \_\_\_\_\_ Zip: \_\_\_\_\_

Date of Death: \_\_\_\_\_

Primary Care Physician: \_\_\_\_\_  
NAME

Street Address: \_\_\_\_\_

City: \_\_\_\_\_ State: \_\_\_\_\_ Zip: \_\_\_\_\_

Phone #: \_\_\_\_\_

The original contract is:     Enclosed     Lost or Destroyed

**PLEASE INCLUDE AN ORIGINAL CERTIFIED DEATH CERTIFICATE WITH THIS CLAIM FORM.**

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## SECTION 2: CLAIMANT DETAILS

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Individual Beneficiary Name: \_\_\_\_\_  
FIRST MIDDLE LAST

Non-Individual Beneficiary Name (trust, estate, charity): \_\_\_\_\_

Social Security Number or EIN for Beneficiary: \_\_\_\_\_

Street Address: \_\_\_\_\_

City: \_\_\_\_\_ State: \_\_\_\_\_ Zip: \_\_\_\_\_

Phone #: \_\_\_\_\_ Alternative Phone #: \_\_\_\_\_

Email Address: \_\_\_\_\_

Date of Birth: \_\_\_\_\_ Relationship to Deceased: \_\_\_\_\_

In what capacity are you claiming benefits?

- Named Beneficiary
- Trustee (Include a copy of the Trust Agreement)
- Executor, administrator, or personal representative of the estate (Include court appointment)
- Charity or Corporation (Include copy of the corporate resolution)
- On behalf of a minor child (Include court documents establishing guardianship)
- As Attorney-in-Fact under a Power of Attorney (Include copy of Power of Attorney)
- Other: \_\_\_\_\_

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### SECTION 3: CERTIFICATION OF TAXPAYER IDENTIFICATION NUMBER (SUBSTITUTE W-9)

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If you are claiming death benefit payments as a U.S. person, the IRS requires you to agree to the following statements.

For federal tax purposes, you are considered a U.S. person if you are:

- An individual who is a U.S. citizen or U.S. resident alien,
- A partnership, corporation, company, or association created or organized in the United States or under the laws of the United States,
- An estate (other than a foreign estate), or
- A domestic trust (as defined in Regulations section 301.7701-7).

Under penalty of perjury, I certify that:

1. The Taxpayer Identification Number shown on this form is my correct taxpayer identification number or I am waiting for a number to be issued to me.

*If the IRS has notified you that you are subject to backup withholding because you failed to report interest or dividends on your tax return, you must cross out item 2 below.*

2. I am not subject to backup withholding because:
  - a. I am exempt from backup withholding, or
  - b. I have not been notified by the Internal Revenue Service (IRS) that I am subject to backup withholding as a result of a failure to report all interest or dividends, or
  - c. the IRS has notified me that I am no longer subject to backup withholding, and

3. I am a U.S. citizen or other U.S. person (defined above), and

4. I am exempt from FATCA reporting.

The IRS does not require your consent to any provision of this document other than the certifications required to avoid backup withholding.

By initialing here, I acknowledge that I have read and agree to the statements on this page. \_\_\_\_\_

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## SECTION 4: FRAUD NOTICE

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**IMPORTANT:** This is part of the claim form. Please review the applicable fraud notice required by your state of residence.

**All states other than those listed below:** Any person who knowingly presents a false or fraudulent claim for payment of a loss or benefit or knowingly presents false information in an application for insurance is guilty of a crime and may be subject to fines and confinement in prison.

**Alaska** - A person who knowingly and with intent to injure, defraud, or deceive an insurance company files a claim containing false, incomplete, or misleading information may be prosecuted under state law.

**Arkansas** - Any person who knowingly presents a false or fraudulent claim for payment of a loss or benefit or knowingly presents false information in an application for insurance is guilty of a crime and may be subject to fines and confinement in prison.

**Arizona** - For your protection Arizona law requires the following statement to appear on this form. Any person who knowingly presents a false or fraudulent claim for payment of a loss is subject to criminal and civil penalties.

**California** - For your protection California law requires the following to appear on this form. Any person who knowingly presents false or fraudulent claim for the payment of a loss is guilty of a crime and may be subject to fines and confinement in state prison.

**Colorado** - It is unlawful to knowingly provide false, incomplete, or misleading facts or information to an insurance company for the purpose of defrauding or attempting to defraud the company. Penalties may include imprisonment, fines, denial of insurance, and civil damages. Any insurance company or agent of an insurance company who knowingly provides false, incomplete, or misleading facts or information to a policyholder or claimant for the purpose of defrauding or attempting to defraud the policyholder or claimant with regard to a settlement or award payable from insurance proceeds shall be reported to the Colorado Division of Insurance within the Department of Regulatory Agencies.

**District of Columbia** - *WARNING:* It is a crime to provide false or misleading information to an insurer for the purpose of defrauding the insurer or any other person. Penalties include imprisonment and/or fines. In addition, an insurer may deny insurance benefits if false information materially related to a claim was provided by the applicant.

**Delaware** - Any person who knowingly, and with intent to injure, defraud or deceive any insurer, files a statement of claim containing any false, incomplete or misleading information is guilty of a felony.

**Florida** - Any person who knowingly and with intent to injure, defraud, or deceive any insurer files a statement of claim or an application containing any false, incomplete, or misleading information is guilty of a felony of the third degree.

**Idaho** - Any person who knowingly, and with intent to defraud or deceive any insurance company, files a statement containing any false, incomplete, or misleading information is guilty of a felony.

**Indiana** - Any person who knowingly and with intent to defraud an insurer files a statement of claim containing any false, incomplete, or misleading information commits a felony.

**Kentucky** - Any person who knowingly and with intent to defraud any insurance company or other person files a statement of claim containing any materially false information or conceals, for the purpose of misleading, information concerning any fact material thereto commits a fraudulent insurance act, which is a crime.

**Louisiana** - Any person who knowingly presents a false or fraudulent claim for payment of a loss or benefit or knowingly presents false information in an application for insurance is guilty of a crime and may be subject to fines and confinement in prison.

**Maine** - It is a crime to knowingly provide false, incomplete or misleading information to an insurance company for the purpose of defrauding the company. Penalties may include imprisonment, fines or a denial of insurance benefits.

**Maryland** - Any person who knowingly and willfully presents a false or fraudulent claim for payment of loss or benefit or who knowingly and willfully presents false information in an application for insurance is guilty of a crime and may be subject to fines and confinement in prison.

**Minnesota** - A person who files a claim with intent to defraud or helps commit a fraud against an insurer is guilty of a crime.

**New Hampshire** - Any person who, with a purpose to injure, defraud or deceive any insurance company, files a statement of claim containing any false, incomplete or misleading information is subject to prosecution and punishment for insurance fraud, as provided in RSA 638.20.

**New Jersey** - Any person who knowingly files a statement of claim containing any false or misleading information is subject to criminal and civil penalties.

**New Mexico** - Any person who knowingly presents a false or fraudulent claim for payment of a loss or benefit or knowingly presents false information in an application for insurance is guilty of a crime and may be subject to civil fines and criminal penalties.

**New York** - Any person who knowingly and with intent to defraud any insurance company or other person files an application for insurance or statement of claim containing any materially false information, or conceals for the purpose of misleading, information concerning any fact material thereto, commits a fraudulent insurance act, which is a crime, and shall also be subject to a civil penalty not to exceed five thousand dollars and the stated value of the claim for each such violation.

**Ohio** - Any person who, with intent to defraud or knowing that he is facilitating a fraud against an insurer, submits an application or files a claim containing a false or deceptive statement is guilty of insurance fraud.

**Oklahoma** - *WARNING:* Any person who knowingly, and with intent to injure, defraud or deceive any insurer, makes any claim for the proceeds of an insurance policy containing any false, incomplete or misleading information is guilty of a felony.

**Oregon** - Any person who makes an intentional misstatement that is material to the risk may be found guilty of insurance fraud by a court of law.

**Pennsylvania** - Any person who knowingly and with intent to defraud any insurance company or other person files an application for insurance or statement of claim containing any materially false information or conceals for the purpose of misleading, information concerning any fact material thereto commits a fraudulent insurance act, which is a crime and subjects such person to criminal and civil penalties.

**Puerto Rico** - Any person who knowingly and with the intention of defrauding presents false information in an insurance application, or presents, helps, or causes the presentation of a fraudulent claim for the payment of a loss or any other benefit, or presents more than one claim for the same damage or loss, shall incur a felony and, upon conviction, shall be sanctioned for each violation with the penalty of a fine of not less than five thousand (5,000) dollars and not more than ten thousand (10,000) dollars, or a fixed term of imprisonment for three (3) years, or both penalties. If aggravating circumstances are present, the penalty thus established may be increased to a maximum of five (5) years; if extenuating circumstances are present, it may be reduced to a minimum of two (2) years.

**Tennessee** - It is a crime to knowingly provide false, incomplete or misleading information to an insurance company for the purpose of defrauding the company. Penalties include imprisonment, fines and denial of insurance benefits.

**Texas** - Any person who knowingly presents a false or fraudulent claim for the payment of a loss is guilty of a crime and may be subject to fines and confinement in state prison.

**Virginia** - It is a crime to knowingly provide false, incomplete or misleading information to an insurance company for the purpose of defrauding the company. Penalties include imprisonment, fines and denial of insurance benefits.

**Washington** - It is a crime to knowingly provide false, incomplete, or misleading information to an insurance company for the purpose of defrauding the company. Penalties include imprisonment, fines, and denial of insurance benefits.

**West Virginia** - Any person who knowingly presents a false or fraudulent claim for payment of a loss or benefit or knowingly presents false information in an application for insurance is guilty of a crime and may be subject to fines and confinement in prison.

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**SECTION 5: SIGNATURES**

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As the authorized signer, please sign and date below in the appropriate space. If you do not sign and date this page, we will not be able to process your claim. NSS Life reserves the right to request additional information we consider necessary to pay the claim.

**By signing, I acknowledge and represent that all information provided in this claim form is true, accurate, and complete to the best of my knowledge and I authorize NSS Life to process the requested death benefit payment as indicated. I am aware that this transaction is NOT reversible.**

Your Signature: \_\_\_\_\_ Signed Date: \_\_\_\_\_

**OR**

Trustee's Signature: \_\_\_\_\_ Signed Date: \_\_\_\_\_

As Trustee of the: \_\_\_\_\_  
TRUST NAME

**OR**

Executor/Administrator Signature: \_\_\_\_\_ Signed Date: \_\_\_\_\_

Executor: \_\_\_\_\_ as Executor/Administrator of the Estate of: \_\_\_\_\_  
EXECUTOR NAME DECEASED'S NAME

**OR**

Corporate Authorized Signature: \_\_\_\_\_ as \_\_\_\_\_  
TITLE

Of \_\_\_\_\_ Signed Date: \_\_\_\_\_  
COMAPANY NAME

**OR**

Attorney-in-Fact Signature: \_\_\_\_\_ Signed Date: \_\_\_\_\_

Power of Attorney: \_\_\_\_\_  
PRINCIPAL NAME

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**TO ENSURE YOU RECEIVE YOUR BENEFIT PAYMENT PROMPTLY, PLEASE CHECK TO MAKE SURE YOU HAVE:**

- Read and agreed to the certification of your taxpayer ID terms in Section 3
- Enclosed an original certified death certificate and other documentation, such as trust documents, power of attorney papers, or any other required forms
- Returned the original policy contract or checked the lost or destroyed box
- Signed and dated on the appropriate line in Section 5

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**PLEASE NOTE:**

**NO FAXED OR EMAILED DOCUMENTS WILL BE PROCESSED OR ACCEPTED.**

**Mailing address:**

NSS Life  
351 Valley Brook Road  
McMurray, PA 15317-3337

**Phone numbers:**

724-731-0094  
1-800-488-1890

**Website:**

[www.nsslife.org](http://www.nsslife.org)