

Request for Payment in case of Death

For policy no.	
	Beneficiary <input type="checkbox"/> legal entity
Name/First name/Company	
Address/ZIP code/Country	
Date of birth/Incorporation date	
Telephone number	
E-mail <input type="checkbox"/> none	
Legal representative	

Recipient account details for the transfer	
Account holder	
Bank	
Intermediary Bank (if needed)	
IBAN	
Cash account no.	
Asset account no.	
BIC (BLZ)/SWIFT	

Money transfer
 Transfer of assets

Currency: EUR CHF USD GBP SEK NOK policy currency

The beneficiary is aware that the sale of certain titles within the applied investment strategy may take some time (weeks, months) and that the surrender amount cannot be paid until all titles have been sold. If the sale is not possible the portfolio will be transferred.

Should the insurance event occur, the benefits due will be paid into the account specified on this form in accordance with the CGI. Youplus will be able to process the case only after receipt of the complete documentation.

Signature of the beneficiary (handwritten signature required)

Place, Date

Beneficiary/Legal representative*

Signature of pledgee (if existent), (handwritten signature required)

Please note that if the insurance policy has been pledged as collateral, the additional consent of the pledgee to the payment is required.

Place, Date	Pledgee

Compulsory enclosures - Youplus reserves the right to request any additional document if needed:

- Original policy** (incl. any appendix) or declaration of loss
- Death certificate** (original or certified copy)
- Medical report** about the causes of death
- Official **document stating the legal heirs** (original or certified copy) or **testament**. In case of underage beneficiaries or beneficiaries under guardianship, additional documents will be requested.
- If the beneficiary is a natural person, **Utility Bill** as proof of residence, not older than 12 months (or 6 months for Irish policies) (e.g. gas, electricity or water bill, TV licence et. al.) or proof of registration
- Identification documents** for each beneficiary/account holder (if different):
 - Natural person:** certified copy of the valid passport or identity card
 - Company/Legal entity:** trade register (not older than 12 months), statutes (or equivalent document), authorized signatory list, certified copy of the valid passport or identity card for each person authorized to sign and corresponding W-8 or W-9 form
- Form "**Self certification regarding tax status**" for each beneficiary/account holder (if different).
- In case of Irish policy: "**Form Self declaration of non-Irish residence**"
- For natural person or legal entity with **US Status:**
 - W-9 form

*The same documents and information requested for the beneficiary will be needed for the legal representative. Please complete page 1 accordingly.