

Critical Illness benefit claim form

(to be completed by the claimant)

Instructions

Please complete this form in English. All questions must be answered accurately with full disclosure of all relevant information. If there is insufficient space for any answer please continue on a separate piece of paper and attach to this form. Please return this questionnaire to your local Zurich office, details of which are on page 7.

We adhere to strict confidentiality procedures when we communicate with our clients. For security purposes, we will regard the details you provide as your authorised contact details; it is therefore important that they are accurate and that you let us know if any of these details change.

Any benefit payment made will be subject to any applicable trade or economic sanctions.

1. Policy number

2. Details of the Life Insured

Title Mr Mrs Ms Other (*specify*)

First name

Last name

Any previous names or alias used, including maiden name (*if applicable*)

3. Details of your claim

Please describe your medical condition in full

What was the overall diagnosis?

Have you undergone any tests or investigations to confirm this diagnosis?

Yes No

If yes, please give details (including date of diagnosis)

What treatment are you currently receiving?

3. Details of your claim (continued)

Have you received any other form of treatment?

Yes No

If yes, please give details

What date did your symptoms first commence?

Date

Have you suffered from the same or similar condition previously?

Yes No

If yes, please give details including dates

Please provide the name and contact details for all the doctors who have treated you (please include name of the hospital, address, telephone number and email address)

Have you received payment for this condition under any other insurance policies?

Yes No

If yes, please give details

Name of the company	Type of Insurance	Amount of cover

Please provide any additional information below which you consider are relevant to your claim.

4. Claimant details

Title Mr Mrs Ms Other (*specify*)

First name

Last name

Any previous names or alias used, including maiden name (*if applicable*)

Date of birth

Country of birth

Place of birth

Nationality

Do you hold nationality in any other country?

Yes No

If yes, please confirm the country

4. Claimant details (continued)

Current residential address

Correspondence address (if different from the residential address)

Email ID

Contact number (including country code)

Is this a US* based telephone number?

Yes No

Are you a US* tax payer?

Yes No

Are you a US* citizen?

Yes No

* The definition of US includes the 50 United States of America, the District of Columbia, Guam, Puerto Rico, US Virgin Islands, American Samoa and the Northern Mariana Islands.

Please state all countries where you are currently deemed to be resident for tax purposes

Country/Countries of tax residence

Tax reference number(s)

Country/Countries of tax residence	Tax reference number(s)

** If you are currently tax resident in the United Kingdom, please provide your National Insurance number

5. Method of payment (Please tick one of the following options)

Autopay

Interbank giro payment (Singapore dollars in Singapore only)

Telegraphic transfer (bank charges apply)

Swedish giro (Swedish krona to Swedish banks)

BACS (UK only)

Bank name

Bank address

Account holder's name(s)

If the above stated account holder(s) name differs from the claimant(s) name, please clarify why and complete the following information. If not different, please leave the below section blank and continue to bank account detail – section 6.

Reason

Title Mr Mrs Ms Other (specify)

First name

Last name

Any previous names or alias used, including maiden name (if applicable)

Date of birth

Country of birth

Place of birth

Nationality

5. Method of payment (continued)

Do you hold nationality in any other country?

Yes No

If yes, please confirm the country

Current residential address

Correspondence address (if different from the residential address)

Email ID

Contact number (including country code)

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Yes No

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Yes No

Are you a US* citizen?

Yes No

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Please state all countries where you are currently deemed to be resident for tax purposes

Country/Countries of tax residence

Tax reference number(s)

Country/Countries of tax residence	Tax reference number(s)

** If you are currently tax resident in the United Kingdom, please provide your National Insurance number.

6. Bank account details

Please provide us bank account details of the country where you are currently resident

Please state the currency of your bank account (AED, USD, GBP, HKD, SEK, etc.)

If you do not indicate the currency of your bank account above, we will proceed to make the payment in the plan currency and this may incur additional charges or exchange rate charges by your bank.

Account number

Sort code (for UK banks only)

SWIFT code (not required for UK banks)

ABA number (US banks only)

IBAN (**Note:** depending on your region, you may not need to use all the IBAN boxes)

Bank number (Hong Kong only)

Branch number (Hong Kong only)

Reference to be quoted (if applicable)

Correspondent bank details (if funds are to be paid through a separate bank)

Bank name

Bank address

Account holder's name

6. Bank account details (continued)

Account number

Sort code (UK banks only) - -

SWIFT code (not required for UK banks)

ABA number (US banks only)

IBAN (**Note:** depending on your region, you may not need to use all the IBAN boxes)

7. Proof of Identity and residential address for claimant(s)

Please ensure a valid suitably certified photographic ID and Proof of Address document are attached along with the form of the claimant. For more details with regards to type of ID and Proof of Address documents that can be used, please refer to the guide attached along.

8. Complaints

If you are not satisfied with our handling of your claim, please refer to our complaints procedure using the below link <https://www.zurich.ae/media/1793/customer-complaints-procedure.pdf>

9. Declaration/Data protection

Declaration

I declare that the answers given, whether in my handwriting or not, are true and complete to the best of my knowledge and belief, and will form the basis of the contract for my claim application.

I understand that failure to disclose any material fact may invalidate the contract resulting in the loss of benefits. Note: a material fact is one which may influence the assessment or acceptance of your claim application. If you are in any doubt as to the relevance of any information, please give details.

Contact details

I understand that for security purposes, the Company will regard the contact details provided as my authorised contact details and that it is important that I let the Company know if any of these details change.

Special category data consent

By signing this form, I consent to the Company processing my medical and health information and authorise the seeking and processing of information from any medical practitioner who has attended me or from any insurer to which an application has been made for insurance. I confirm such authorisation shall remain in force after my death.

Withdrawal of consent

I understand that where I have provided consent I have the right to withdraw the consent at any time and that such withdrawal will not affect the data processing carried out prior to such withdrawal.

I confirm that this signature is mine or that of my appointed legal representative

If your signature is different from the signature in your passport/ID, or does not exist on the passport/ID, or if your signature has changed over a period of time, you will need to complete a 'Certifying signature form' and include a certified copy of the signature page of the passport even if it is not signed.

Signature of the life insured

Date

10. Privacy notice

This Notice is a summary of our Privacy Policy which describes how we collect and use personal information as Data Controller. For the full version please visit online <https://www.zurichinternational.com/en/zurich-international-life/about-us/privacy> or contact us for a copy.

Personal information we use

We use personal information such as name and contact details ("Personal Data") and sensitive personal information such as medical details ("Special Category Data").

What we do with personal information

We use personal information to provide financial services, for example processing in connection with:

- setting up and managing a contract of insurance
- providing marketing information with consent
- complying with our legal obligations
- running our business where we have a legitimate interest to do so.

Without accurate and sufficient personal information where required, we cannot offer financial services.

Sharing of personal information

We obtain personal information from, and share personal information with other organisations such as:

- Zurich Insurance Group Ltd. or any of its affiliated companies
- companies who supply services to us such as administration
- healthcare service providers
- financial advisors and employers where appropriate.

How we transfer personal information to other countries

As a global business we ensure that personal information is equally protected in all locations by complying with data protection laws of the EU, Isle of Man and of each location in which operate.

How long we hold personal information for

We retain personal information for as long as is necessary to meet the purposes for which it was originally collected or to satisfy our legal obligations.

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11. Local Zurich office contact details

Bahrain

Telephone: +973 1756 3321
Email: benefit.claims@zurich.com

Isle of Man

Telephone: +44 1624 662266
Email: benefit.claims@zurich.com

Qatar

Telephone: +974 4496 7555
Email: benefit.claims@zurich.com

Singapore

Telephone: +65 6876 6750
Email: benefit.claims@zurich.com

United Arab Emirates

Telephone: +971 4 363 4567
Email: benefit.claims@zurich.com

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