

# Funeral Benefit

## Privacy Statement

### Notice under the Privacy Act 2020 and The Health Information Privacy Code 2020

'We', 'us' and 'our' refers to Momentum Life Limited (Momentum Life) and 'you' and 'your' refers to the Policy Owner, the Life Insured and the claimant.

We collect personal information about you. The personal information and any additional information obtained, (including medical information or financial information if required) will be used by us and our officers to assess and administer the claim. The information may also be used for statistical purposes provided you are not identified.

Momentum Life, their subsidiaries, advisers, reinsurers and any agents appointed by us collect from, use, and disclose to any third party, your information that is reasonably necessary to assess, administer and manage the claim. Those third parties include (but are not limited to): advisers, agents, health service providers including recognised private and public hospitals, registered medical practitioners and specialists, medical authorities,

Accident Compensation Corporation, therapists, insurers and reinsurers, and any other individual organisation where the collection/disclosure may be permitted by law.

The information may also be disclosed outside of Momentum Life where the disclosure is necessary for one or more purposes for which the personal information was collected, to agents, representatives, organisations, or contractors who provide services to us in connection with the administration of products or services, or for the purpose of customer satisfaction surveys, or where permitted by law.

We will take all reasonable steps to keep any personal information we collect and hold about you or any other Life Insured secure and ensure your information is accurate, complete and up-to-date.

Under the Privacy Act 2020 you have the right of access to and correction of the information that we hold about you. We will rely on you to keep us informed of any changes to your information.

The Momentum Life Privacy Policy is available at [momentumlife.co.nz](https://momentumlife.co.nz). If you have any query in relation to your privacy please contact Momentum Life:

**Phone:** 0800 108 108 (Mon to Fri, 9am - 7pm NZST) **Email:** [claims@momentumlife.co.nz](mailto:claims@momentumlife.co.nz)

**Mail:** Claims Manager, Momentum Life, PO Box 99892, Newmarket, Auckland 1149

## Completion instructions

**Step 1:** As the Policy Owner (or Claimant if the Policy Owner is deceased), you should first check your most recent policy schedule to make sure that the Funeral cover is in place and current for the deceased Life Insured.

**Step 2:** Then complete **Parts A to F**. If you cannot locate the most recent policy schedule and/or are unsure who the nominated beneficiaries are, please call us for assistance.

**Step 3:** Then send the completed form back to Momentum Life, together with the documentation listed in **Part D**.

## Part A: Policy details

|               |            |                |  |
|---------------|------------|----------------|--|
| Policy Owner: |            | Policy number: |  |
| Address:      |            |                |  |
| Suburb:       | City:      | Postcode:      |  |
| Phone (H):    | Phone (W): | Phone (M):     |  |
| Email:        |            |                |  |

## Part B: Claimant's details

**Please tick the relevant box.** I am the:  Policy Owner  Nominated beneficiary  Relative  Executor  Other

|            |             |            |  |
|------------|-------------|------------|--|
| Title:     | First name: | Surname:   |  |
| Address:   |             |            |  |
| Suburb:    | City:       | Postcode:  |  |
| Phone (H): | Phone (W):  | Phone (M): |  |
| Email:     |             |            |  |

## Part C: Deceased's details

|                 |  |                |  |
|-----------------|--|----------------|--|
| First name:     | Surname:   |                |  |
| Date of birth:  | <input type="text"/> / <input type="text"/> / <input type="text"/> | Date of death: | <input type="text"/> / <input type="text"/> / <input type="text"/> |
| Cause of death: |  |                |  |

## Part D: Required documentation

Please tick the boxes to confirm you have submitted all the required documents to us.

- A **CERTIFIED COPY** of evidence of death (eg. Death Certificate or Coroner's Report)
- A **CERTIFIED COPY** of evidence of the Deceased's age (eg. Birth Certificate, New Zealand Passport or Driver's Licence)
- A **CERTIFIED COPY** of proof of your identity (eg. Birth Certificate, New Zealand Passport or Driver's Licence)

### What is a certified copy?

This is a signed photocopy of an original document. The person signing it must see the original and the photocopy. It can be signed by a Justice of the Peace, accountant, solicitor, doctor, bank officer or police officer. It means you keep the original as we do not require it.

## Part E: Beneficiary payment authority

This section must be completed by the Policy Owner or, where the Policy Owner is deceased, by the claimant. Once the claim has been accepted the benefit will be paid to the Policy Owner. If the Policy Owner is deceased, payment will be to the nominated beneficiaries. If unsure, please contact us for assistance.

### Policy Owner if alive, or first nominated beneficiary:

|                 |                         |           |                      |   |                      |   |                      |
|-----------------|-------------------------|-----------|----------------------|---|----------------------|---|----------------------|
| First name:     | Surname:                |           |                      |   |                      |   |                      |
| Address:        |                         |           |                      |   |                      |   |                      |
| Suburb:         | City:                   | Postcode: |                      |   |                      |   |                      |
| Phone:          | Email:                  |           |                      |   |                      |   |                      |
| Name of bank:   | Name of account holder: |           |                      |   |                      |   |                      |
| Account number: | <input type="text"/>    | -         | <input type="text"/> | - | <input type="text"/> | - | <input type="text"/> |

## Part E: Beneficiary payment authority (continued)

### Nominated beneficiary/ies continued:

|                 |   |           |
|-----------------|---|-----------|
| First name:     | Surname:  |           |
| Address:        |   |           |
| Suburb:         | City:   | Postcode: |
| Phone:          | Email:  |           |
| Name of bank:   | Name of account holder:   |           |
| Account number: | [ ] [ ] - [ ] [ ] [ ] [ ] - [ ] [ ] [ ] [ ] [ ] [ ] [ ] [ ] - [ ] [ ] |           |

|                 |   |           |
|-----------------|---|-----------|
| First name:     | Surname:  |           |
| Address:        |   |           |
| Suburb:         | City:   | Postcode: |
| Phone:          | Email:  |           |
| Name of bank:   | Name of account holder:   |           |
| Account number: | [ ] [ ] - [ ] [ ] [ ] [ ] - [ ] [ ] [ ] [ ] [ ] [ ] [ ] [ ] - [ ] [ ] |           |

|                 |   |           |
|-----------------|---|-----------|
| First name:     | Surname:  |           |
| Address:        |   |           |
| Suburb:         | City:   | Postcode: |
| Phone:          | Email:  |           |
| Name of bank:   | Name of account holder:   |           |
| Account number: | [ ] [ ] - [ ] [ ] [ ] [ ] - [ ] [ ] [ ] [ ] [ ] [ ] [ ] [ ] - [ ] [ ] |           |

|                 |   |           |
|-----------------|---|-----------|
| First name:     | Surname:  |           |
| Address:        |   |           |
| Suburb:         | City:   | Postcode: |
| Phone:          | Email:  |           |
| Name of bank:   | Name of account holder:   |           |
| Account number: | [ ] [ ] - [ ] [ ] [ ] [ ] - [ ] [ ] [ ] [ ] [ ] [ ] [ ] [ ] - [ ] [ ] |           |

## Part F: Declaration

As the Claimant I have read and carefully considered the questions on this document and all the responses are true and correct in relation to the claim. By completing this form I acknowledge I have a duty to provide Momentum Life with all the facts material to my claim and all information they may reasonably require in relation to my claim.

I acknowledge that the making of a false statement may invalidate this claim, and that if I fail to provide all or part of the information Momentum Life requires to assess this claim, it will not be assessed and processed.

I have read and consent to the Privacy Statement on page 1.

**Claimant's signature:**

**Date:** [ ] [ ] / [ ] [ ] / [ ] [ ] [ ] [ ]

### Please return the completed form to Momentum Life. You can either:

1. Scan & email to [claims@momentumlife.co.nz](mailto:claims@momentumlife.co.nz) (please put 'CONFIDENTIAL, Policy Owner's surname, Policy Number' in the subject line); or
2. Mail to The Claims Manager, Momentum Life, PO Box 99892, Newmarket, Auckland 1149 (please mark the envelope as CONFIDENTIAL).