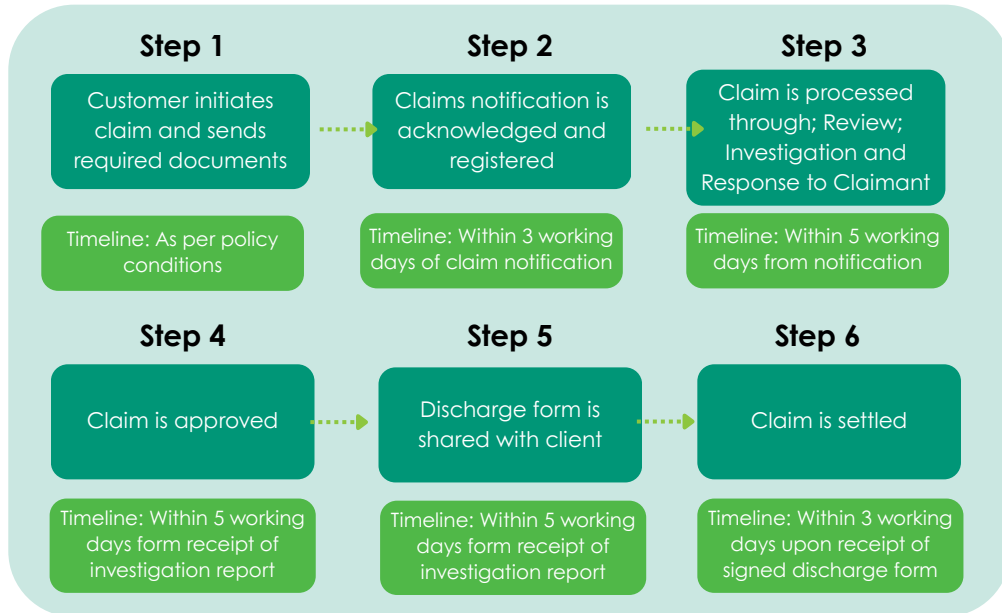


At Old Mutual Life Assurance, we're committed to paying valid claims quickly and efficiently. Our streamlined claims process is designed to ensure timely support, with clear steps from submission to pay out—because we're here when our clients need us most.

### Our Claims Process



### Required Documents- Retail Claims

<b>Maturities/Surrenders/Refunds</b> <ul style="list-style-type: none"> <li>• Policy document</li> <li>• National ID/ Passport</li> <li>• Signed Claim Form</li> </ul>	<b>Death Claims</b> <ul style="list-style-type: none"> <li>• Signed Claim Form</li> <li>• National ID/ Passport</li> <li>• Death Certificate</li> <li>• Deceased's ID</li> <li>• Next of Kin ID</li> <li>• Policy Document</li> <li>• Police Report (Accident Claims)</li> </ul>
<b>Policy Loans</b> <ul style="list-style-type: none"> <li>• Policy Document</li> <li>• National ID/ Passport</li> <li>• Signed Claim Form</li> <li>• Loan Application Forms</li> </ul>	<b>Overpayment Refunds</b> <ul style="list-style-type: none"> <li>• Signed Claim Form</li> <li>• National ID/ Passport</li> </ul>
<b>Accidental Disability</b> <ul style="list-style-type: none"> <li>• Policy Document</li> <li>• National ID/ Passport</li> <li>• Signed Claim Form</li> <li>• Doctor's Report</li> <li>• Police Report</li> <li>• Invoice</li> </ul>	<b>Permanent Disability</b> <ul style="list-style-type: none"> <li>• Policy Document</li> <li>• National ID/Passport</li> <li>• Signed Claim Form</li> <li>• Doctor's Report</li> <li>• Police Report</li> <li>• Proof of Disability Form</li> </ul>

### Required Documents- Corporate Claims

Claim Notification form.	all claims
Identification (National id).	
Introduction Letter from Branch Manager/Head office.	
Letter of Undertaking	
Loan Amortization/ Repayment Schedule (statement).	
Loan application and agreement.	
Loan statement and account statement	Critical illness
Offer Letter	
Updated medical report	Death
LC Letter from residential zone.	
Verified death certificate (for death claims).	
Letter of confirmation of death from employer (death claims).	Death under employment
Police report (if death is accidental)/ Police postmortem report.	Disability
Proof of disability form (For permanent disability cases).	Retrenchment
Contract of employment	
Call report (extent to which the bank contacted the customer to pay up their	
Termination Letter	

### Documents Required from the Insurer

- Acknowledgement Slip/ Email
- Discharge Form