

**INSTRUCTIONS:**

1. Please make certain that all pertinent questions are answered and the proper supporting documents are included before forwarding claim to avoid unnecessary delay in processing the claim.
2. Please submit along with this completed form a certified copy of the official Death Certificate and the original enrollment card with all applicable changes of beneficiary. If Accidental Death benefits are being claimed, provide any police report, autopsy report, newspaper articles or similar document that describes the accident.
3. If benefits are to be paid to a minor beneficiary, a certified copy of the appointment of a guardian of the estate of the minor by the Court is required prior to any payment.
4. If benefits are to be paid to the estate of the deceased, a certified copy of the appointment of the executor or administrator of the estate of the deceased insured by the Court is required prior to any payment.
5. If the designated beneficiary predeceased the insured, a certified copy of the Death Certificate of the deceased beneficiary will be required.
6. If no beneficiary was designated or if the designated beneficiary predeceased the insured, then the insurance becomes payable based on the following order of preference to: surviving spouse, deceased's children, deceased's parents, deceased's brothers and sisters, or to the executors or administrators of the deceased's estate, unless directed specifically by the policy.
7. If more than one beneficiary is entitled to receive the insurance proceeds, the additional beneficiaries should sign below and provide the requisite information.
8. If the decedent was permanently and totally disabled and death occurred more than 31 days after the termination of insurance under the group policy, the beneficiary should complete and have the decedent's attending physician complete the Total and Permanent Disability application (Form No. LHFM-ULL-1141), which should be forwarded with the claim.

**FRAUD NOTICE:**

**California:** 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.

**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.

**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.

**Maryland:** Any person who knowingly and willfully presents a false or fraudulent claim for payment of a 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.

**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 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.

**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.

**Rhode Island:** 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.

**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.

**For all other states:** WARNING: Any person, acting alone or in concert with another, who knowingly and with intent to defraud, injure, or deceive any insurance company submits a claim or application containing any false, deceptive, incomplete or misleading information may be committing a fraudulent insurance act which is a crime and may subject such person to criminal or civil penalties or denial of benefits.

## PROOF OF DEATH

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**Please submit this form to:**  
GROUP LIFE CLAIM DEPARTMENT  
The Union Labor Life Insurance Company  
8403 Colesville Road • Silver Spring, MD 20910  
Phone: (202) 682-6768 • Fax: (202) 962-2939  
Toll-free: (866) 795-0680

### POLICYHOLDER'S STATEMENT

Claim is hereby filed for the following benefits and amounts.

Insured name: \_\_\_\_\_

<u>Claim type</u>	<u>Amount of insurance</u>	<u>Policy number</u>
Basic Life:	\$ _____	G- _____
Supplemental Life:	\$ _____	G- _____
Accidental Death:	\$ _____	C- _____

Decedent is: ☐ Active ☐ Retiree ☐ Spouse ☐ Child

### REGARDING THE DECEASED

1a. Name: \_\_\_\_\_

2a. Date of birth: \_\_\_\_\_  
Month/day/year

3a. Date of death: \_\_\_\_\_  
Month/day/year

4a. Date last worked: \_\_\_\_\_

4c. Cause of death (In detail): \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

### Policyholder's Certification

We certify that the decedent was eligible at the time of death.

Policyholder: \_\_\_\_\_  
Name of Union, Fund, or Employer

By: X \_\_\_\_\_  
Signature and Title

Date: \_\_\_\_\_

1b. SSN: \_\_\_\_\_

2b. Place of birth: \_\_\_\_\_  
City/State

3b. Place of death: \_\_\_\_\_  
City/State

4b. Last occupation: \_\_\_\_\_

### QUESTIONS NO. 5 AND 6 SHOULD ONLY BE ANSWERED IF ACCIDENTAL DEATH CLAIM IS FILED.

5a. Date of accident: \_\_\_\_\_ 5b. Place of accident: \_\_\_\_\_

6. Describe fully how the accident occurred and the nature of injuries received: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

### BENEFICIARY STATEMENT (Beneficiary Social Security must be provided)

Full name: \_\_\_\_\_ Date of birth: \_\_\_\_\_ SSN: \_\_\_\_\_

Address/P.O. Box number: \_\_\_\_\_ City: \_\_\_\_\_ State: \_\_\_\_\_ Zip: \_\_\_\_\_

Day time phone: \_\_\_\_\_ Evening phone: \_\_\_\_\_ Relationship to the deceased: \_\_\_\_\_

I hereby certify that the answers I have made to the questions are both complete and true to the best of my knowledge and belief. I acknowledge that I have read the fraud warning(s) on page 1 of this form.

BENEFICIARY X \_\_\_\_\_ Date \_\_\_\_\_

**PLEASE COMPLETE ALL PAGES**

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### For additional beneficiaries complete the information below:

Full name: \_\_\_\_\_ Date of birth: \_\_\_\_\_ SSN: \_\_\_\_\_  
Address/P.O. Box number: \_\_\_\_\_ City: \_\_\_\_\_ State: \_\_\_\_\_ Zip: \_\_\_\_\_  
Day time phone: \_\_\_\_\_ Evening phone: \_\_\_\_\_ Relationship to the deceased: \_\_\_\_\_

I hereby certify that the answers I have made to the questions are both complete and true to the best of my knowledge and belief. I acknowledge that I have read the fraud warning(s) on page 1 of this form.

**BENEFICIARY** X \_\_\_\_\_ Date: \_\_\_\_\_  
Signature

Full name: \_\_\_\_\_ Date of birth: \_\_\_\_\_ SSN: \_\_\_\_\_  
Address/P.O. Box number: \_\_\_\_\_ City: \_\_\_\_\_ State: \_\_\_\_\_ Zip: \_\_\_\_\_  
Day time phone: \_\_\_\_\_ Evening phone: \_\_\_\_\_ Relationship to the deceased: \_\_\_\_\_

I hereby certify that the answers I have made to the questions are both complete and true to the best of my knowledge and belief. I acknowledge that I have read the fraud warning(s) on page 1 of this form.

**BENEFICIARY** X \_\_\_\_\_ Date: \_\_\_\_\_  
Signature

### ULLICO BENEFICIARY ASSET ACCOUNT\*

#### If your insurance benefit is \$10,000 or more, please complete this section.

You may select from the two options below to receive your benefit payments. If you choose the Beneficiary Asset Account, The Union Labor Life Insurance Company will open a free, interest-bearing Ullico Beneficiary Asset Account in your name. The free drafts and a description of this service will be sent to you upon approval of this claim. Some of the features include:

**Safety** – The full amount in the Account, including interest earned, is completely guaranteed by The Union Labor Life Insurance Company.

**Competitive** – The Account earns a competitive interest rate. Interest is compounded daily and credited monthly to your account.

Go to [www.Ullico.com/BeneficiaryAssetAccount](http://www.Ullico.com/BeneficiaryAssetAccount) for the current interest rate and further information.

**Convenient** – You may immediately withdraw amounts as large as the entire account balance. There is no limit to the number of drafts you can write each month, as long as their combined total does not exceed your account balance.

**Free** – There are no monthly service fees, closing fees, or draft charges.

**Full-Service** – Toll-free telephone access to specially trained Customer Service Representatives is available.

**Time to Decide** – Your Ullico Beneficiary Asset Account is designed to give you easy access to your money, while earning a competitive interest rate from the moment your account is established.

**You may choose an option other than the Ullico Beneficiary Asset Account, such as a check for the entire amount of the benefit. For details on other settlement options, contact the Group Life Claim department at 866-795-0680 or write to: 8403 Colesville Road, Silver Spring, MD 20910. Check the appropriate box below:**

☐ Yes, please open a Ullico Beneficiary Asset Account ☐ Please send a check for the full amount \_\_\_\_\_

\* The Ullico Beneficiary Asset Account is not available to the beneficiary if: (1) the benefit amount is less than \$10,000; (2) the beneficiary is a minor; (3) the beneficiary resides in a foreign country; (4) the beneficiary is a corporation, partnership, tax exempt entity, trust, or any other third party. If no selection is made, a check for the full amount will be sent.

Signature of Beneficiary X \_\_\_\_\_ Date \_\_\_\_\_

PLEASE SIGN AS YOU WOULD SIGN A CHECK

**PLEASE COMPLETE ALL PAGES**

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**ULLICO BENEFICIARY ASSET ACCOUNT\* (continued)**

**Account Statements**

You will receive monthly statements of transactions showing withdrawals, interest credited, applicable rate(s) of interest and any other activity. Cancelled drafts will be retained by State Street Bank and Trust Company. Copies of cancelled drafts can be obtained by contacting Customer Service at (877) 849-0030 (customer code 359).

**Interest**

Interest is earned on your Ullico Beneficiary Asset Account from the date the account is established until the date each draft clears. Interest is compounded daily and is credited to the account at the end of each month or when the account is closed. The interest rate will be determined by The Union Labor Life Insurance Company and will be reviewed periodically and changed at the discretion of Union Labor Life. Minimum interest rate is 0.25%. Interest paid on this account may be taxable. Please consult your tax advisor.

Drafts drawn on the Ullico Beneficiary Asset Account are payable through State Street Bank and Trust Company and clear through Federal Reserve Banks\*. The account balance is fully guaranteed by The Union Labor Life Insurance Company.

\*The account is not FDIC insured and the amount in the account may exceed the limit protected by the state insurance guaranty fund in case of insurer insolvency. They are however backed by the financial strength of the insurance company as were the premiums paid into the insurance policy. In addition, they are guaranteed by State Guaranty Associations. For more information on your specific state, see The National Organization of Life & Health Guaranty Associations (NOLHGA) web site at [www.nolhga.com](http://www.nolhga.com).