

**APOLLO LIFE ASSURANCE LIMITED**

**RETIREMENT BENEFIT CLAIM FORM**

**A. ALL CLAIMS**

8.2

Name of Scheme		
Name of Member as per ID/Passport		
ID/Passport Number		
Date Membership is to cease		
Member Number		
Member Mailing Address		
Member Mobile Number		
Member Email Address		
<b>REASON FOR MEMBER CEASING TO BE EMPLOYED</b>		
Ill Health	YES	NO
Discharge but no misconduct	YES	NO
Voluntary Resignation	YES	NO
Redundancy	YES	NO
Misconduct	YES	NO
Death	YES	NO
Retirement	Normal	EARLY/LATE

**B. WITHDRAWAL FROM SERVICE**

**NOTE:**

If a member is within 10 years of customary retirement age and/or is retiring owing to ill health then it is strongly recommended that the matter is discussed with the Company or your insurance broker before a final decision is made. It may be possible to revise alternative and more suitable benefits.

**1. CASH REFUND**

Is a cash refund required	NO	YES
Member's share of refund from employer cont.		%

**2. EARLY RETIREMENT PENSION**

Is the Member entitled under the Scheme Rules to an early retirement Pension	YES	NO
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### 3. CONTINUATION COVER

The withdrawing Member wishes to investigate maintaining contributions privately or via his new employer	YES	NO
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For and on behalf of the Trustees \_\_\_\_\_

#### C. DEATH CLAIM

##### i) Benefit arising from deceased member -contributions (if any)

The balance standing to the credit of the deceased member arising from his own contributions will be calculated by the Company and you will be advised.

This amount is usually payable to the Member's estate, any uncertainty should be discussed with the Company, your insurance broker or legal advisers.

##### ii) Benefit arising from Employer contributions

CLASS OF POLICY	TYPE OF BENEFITS
ENDOWMENT	Lump Sum: Sum Assured plus bonus (if any)
GROUP LIFE	Lump Sum: Sum Assured
DEPOSIT ADMINISTRATION	Lump Sum: Refund of contribution plus interest
WIDOWS PENSION	Monthly pension to Widow
ORPHANS PENSION	Monthly pension to orphan(s)

#### **NOTE:**

It may be desirable for a part or the whole of lump sum benefit to be used to purchase a regular monthly pension for a widow or other dependant. Should you require quotations for consideration these will be provided. The most suitable class of pension will be discussed with the Insurance Company or your insurance broker and, of course, with the recipient.

a)

Do you wish to consider the purchase of a dependant's pension	YES	NO
Age of Widow		

b)

All Lump sum benefits are to be paid in cash	YES	NO
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#### DOCUMENTS REQUIRED

c)

Death Certificate – all claims	Enclosed
	To Follow
When pension is to be provided for a dependant then evidence of age is necessary and where relevant evidence of marriage	Enclosed
	To Follow

For and on behalf of the Trustees \_\_\_\_\_