

## LAPSE VALUE CLAIM FORM

Section A, B & D - Must be completed by all applicants. Please complete this form using **BLOCK CAPITALS**

SECTION A – APPLICANT DETAILS		
Details of applicant(s)	1 <sup>st</sup> applicant	2 <sup>nd</sup> applicant
Title (Please tick)	<input type="checkbox"/> Mr <input type="checkbox"/> Mrs <input type="checkbox"/> Ms <input type="checkbox"/> Other (in full)	<input type="checkbox"/> Mr <input type="checkbox"/> Mrs <input type="checkbox"/> Ms <input type="checkbox"/> Other (in full)
1. Full name	<input type="text"/>	<input type="text"/>
Present address (if different from that on the original application)	<input type="text"/>	<input type="text"/>
Existing policy number	<input type="text"/>	
SECTION B – ENCASHMENT DETAILS		
2. Full Payment	<input type="checkbox"/>	
SECTION C – PAYEE DETAILS		
Payee name(s)	<input type="text"/>	<input type="text"/>
Payee address	<input type="text"/>	<input type="text"/>
SECTION D – Must be completed by all applicants		
I/We wish to claim the cash in value of the above policy at the date of lapse together with late payment interest in full and final settlement of my policy.		
Signature of the 1 <sup>st</sup> applicant (or titleholder if different-see note below)	<input type="text"/>	Date <input type="text"/>
Signature of the 2 <sup>nd</sup> applicant (or titleholder if different-see note below)	<input type="text"/>	Date <input type="text"/>
<b>Note:</b> If the policy is assigned or written in trust any assignee or additional trustee must also sign this form.		

### Additional information required to claim cash in value:

- Original policy document/schedule (or)
- Fully completed lost policy declaration (overleaf)
- If you have recently moved house - proof of address – i.e. utility bill, (dated within last 3 months)
- If you have married since you took out the policy and are using your married name, please provide a copy of your marriage certificate

## LOST POLICY DECLARATION

Please complete this form using **BLOCK CAPITALS**

### STEP 1 – POLICY DETAILS

Policy Number

Contract Type

### STEP 2 – OWNERS OF THE POLICY

**Owner 1**

Title (Please tick)     Mr     Mrs     Ms     Other  
(in full)

Surname

Forename(s) (in full)

Address  
(for correspondence)


**Owner 2 (if any)**

Title (Please tick)     Mr     Mrs     Ms     Other  
(in full)

Surname

Forename(s) (in full)

Address  
(for correspondence)


### STEP 3: DECLARATION

- I declare that the policy schedule has been lost and that I am the legal owner of the policy and I am legally entitled to the proceeds of the above policy.
- The policy has not been assigned, pledged as security or given to any person who could have any claim upon it.
- I will return the policy schedule to Phoenix Ireland if this is found.
- I will indemnify Phoenix Ireland against any claim and any loss or expense which it may incur in consequence of the above not being true and / or payment of the maturity proceeds being made without the policy schedule being returned to Phoenix Ireland.

Signature of the Owner /  
Authorised Signatory 1   

Date

Signature of the Owner /  
Authorised Signatory 2   

Date

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Scottish Mutual International Limited is authorised and regulated by the Central Bank of Ireland and is registered in Ireland (Company No. 242244).  
The company's registered office is 25-28 North Wall Quay Dublin 1, Ireland. An up-to-date list of its directors, containing the particulars required by paragraphs (a), (b) and (c) of section 196(1) of the Companies Act 1963, is available upon request from the company's registered office.

Phoenix Life Limited is authorised and regulated in the United Kingdom by the Financial Services Authority. Phoenix Life Limited is incorporated in England (Company No. 1016269) and has a registered branch in Ireland (Branch No. 906073). The company's registered office is 1 Wythall Green Way, Wythall, Birmingham B47 6WG United Kingdom. Its directors are A B Davidson (UK), J P Evans (UK), M J Merrick (UK), A Moss (UK), M D Ross (UK), J C Park (UK), W R Treen (UK), M N Urmston (UK) and J Yates (UK).  
(UK). **PI\_LPD/0910**