

## BUSINESS ASSURANCE POLICYHOLDER CLAIM FORM

*The Professional Provident Society (PPS) Holdings Trust No IT 312/2011 is a registered South African Trust. The Professional Provident Society Insurance Company Limited Reg. No 2001/017730/06 is a licensed insurer conducting life insurance business, a licensed controlling company and an authorised financial services provider. Any reference to PPS in this form means PPS Insurance.*



### IMPORTANT

PPS Insurance endeavours to pay all valid claim timeously. Correct completion of this form will aid the prompt processing of your claim. Should you require assistance in completing the claim form we suggest that you contact your PPS-accredited financial adviser or contact the PPS Member Services Department directly.

#### PPS contact details:

##### Claim submissions:

**E:** [claims@pps.co.za](mailto:claims@pps.co.za)

##### Claim-related enquiries:

**E:** [memberservices@pps.co.za](mailto:memberservices@pps.co.za)

**T:** 0860 123 777 or 010 085 3820

Monday to Friday from 07:00 to 19:00 and Saturday from 08:00 to 13:00

### CLAIM REQUIREMENTS

Claims in respect of the PPS Business Assurance benefit should be submitted with the following supporting documents:

#### 1. Business Life cover:

- Business Assurance Policyholder claim form
- PPS Business Life cover declaration by Doctor
- PPS Business Life cover declaration by Police

#### 2. Accelerated Business Disability cover:

- Business Assurance Policyholder claim form
- Business Disability benefit declaration by Doctor
- Business Disability benefit declaration by the life-insured
- Comprehensive medical report

#### 3. Accelerated Business Critical Illness cover:

- Business Assurance Policyholder claim form
- Business Critical Illness cover – Doctor claim form
- Business Critical Illness cover – Declaration by the life-insured
- Comprehensive medical report

#### 4. Terminal Illness cover:

- Business Assurance Policyholder claim form
- PPS Business Terminal Illness benefit declaration by the life-insured
- PPS Business Terminal Illness benefit declaration by Doctor

#### 5. Payment to a Trust:

- Copy of the Trust Deed
- Copy of the appointment of trustees
- Certified copy of proof of bank account for the Trust, on the bank letterhead, not older than three months
- Certified copies of the IDs of all trustees and beneficiaries of the Trust not older than three months
- PPS Business Life Cover Benefit – Trust Banking Particulars form

#### 6. Payment to a company

- Companies and Intellectual Property Commission (CIPC) documents
- Certified copy of proof of bank account for the company, on the bank letterhead, not older than three months
- Certified copy of director's ID not older than three months

## PARTICULARS OF THE BUSINESS

Business name:

Registration number:

E-mail:

Key business representative name and surname:

Key business representative ID number:

## PARTICULARS OF LIFE-INSURED

Surname:  Initials:

ID/Passport number (if no ID):

## PARTICULARS OF THE CLAIM

Please select the business solution for which you are claiming and provide the policy number:

Solution	Buy-and-sell cover	Contingent liability cover	Credit loan account cover	Key person cover
Policy number				

**FOR PAYMENT OF CONTINGENT LIABILITY, CREDIT LOAN ACCOUNT AND KEY PERSON BENEFITS:****BANKING DETAILS OF THE BUSINESS** Benefits will be paid into the business bank account

**NOTE:** Financial governance requires that all benefits regarding member claims must be settled to the same account from which your premiums are paid (**premium-paying account**). Please note that this is an improved security measure to mitigate financial risks for claiming policyholders.

Please provide alternative bank details below if you cannot receive payment to your premium-paying account for any reason. Changing the account to which claim benefits are paid will require additional diligence and proof. **The required additional diligence will take an additional five working days before payment can be made.**

If you must change your banking details, please include the required proof together with this claim form.

**I understand this note and request PPS to:** (Select the appropriate option)

1. Pay any benefits due to my existing premium-paying account. ☐

2. Use the new account details below to pay any benefits due to me. ☐

2.1. Please update my premium-paying account to the new details below for future premium payments. YES ☐ NO ☐

Name of account holder:

Name of bank:

Account number:

Branch code:

Type of account:

**If you have selected option 2 above, please provide PPS with proof of account and certified proof of the account holder's identity. The accepted proof of account is a bank-stamped verification letter on the bank's letterhead not older than three months. PPS cannot make changes to this account without the required proof.**

**For payments into an international bank account:**

IBAN no:

Bank's physical address:

**Foreign bank accounts:** Please note that in terms of the PPS Provider™ Policy, premiums from the policyholder should be paid from a South African bank account and benefits to the policyholder should also be paid into a South African bank account, in South African currency. Accordingly, PPS Insurance assumes no responsibility or liability whatsoever in the event the policyholder pays premiums from a foreign bank account, or the policyholder nominates a foreign bank account for receipt of policy benefits. Furthermore, any payment to and from PPS Insurance involving a foreign bank shall be at the sole discretion of PPS Insurance and subject to the South African foreign exchange regulations and other relevant legislation as amended from time to time. PPS Insurance assumes no responsibility or liability to inform the policyholder of any changes in such regulations and legislation.

**Indemnity:** Please note that PPS will not be held liable for incorrect payments if the account information supplied is incorrect. By signing this form, the policyholder indemnifies PPS and holds PPS harmless against any losses, liabilities, claims, charges, expenses, costs or any other actions or demands of whatever nature, which could or might be suffered or incurred by the policyholder or any third party whether directly or indirectly, caused by and/or arising out of the payment into the above account.

## FOR PAYMENT OF BUY-AND-SELL BENEFITS:

**NOTE:** Benefits will be paid into the respective policyholder's bank account.

### DETAILS FOR POLICYHOLDER 1

#### Personal particulars:

Full names:

Surname:

ID/Passport number (if no ID):

Cell phone:

E-mail:

#### Bank account details:

**NOTE:** Financial governance requires that all benefits regarding member claims must be settled to the same account from which your premiums are paid (**premium-paying account**). Please note that this is an improved security measure to mitigate financial risks for claiming policyholders.

Please provide alternative bank details below if you cannot receive payment to your premium-paying account for any reason. Changing the account to which claim benefits are paid will require additional diligence and proof. **The required additional diligence will take an additional five working days before payment can be made.**

If you must change your banking details, please include the required proof together with this claim form.

**I understand this note and request PPS to:** (Select the appropriate option)

1. Pay any benefits due to my existing premium-paying account. ☐
2. Use the new account details below to pay any benefits due to me. ☐

2.1. Please update my premium-paying account to the new details below for future premium payments. YES ☐ NO ☐

Name of account holder:

Name of bank:

Account number:

Branch code:

Type of account:

Percentage of business ownership:  %

**If you have selected option 2 above, please provide PPS with proof of account and certified proof of the account holder's identity. The accepted proof of account is a bank-stamped verification letter on the bank's letterhead not older than three months. PPS cannot make changes to this account without the required proof.**

### For payments into an international bank account:

IBAN no:

Bank's physical address:

**Foreign bank accounts:** Please note that in terms of the PPS Provider™ Policy, premiums from the policyholder should be paid from a South African bank account and benefits to the policyholder should also be paid into a South African bank account, in South African currency. Accordingly, PPS Insurance assumes no responsibility or liability whatsoever in the event the policyholder pays premiums from a foreign bank account, or the policyholder nominates a foreign bank account for receipt of policy benefits. Furthermore, any payment to and from PPS Insurance involving a foreign bank shall be at the sole discretion of PPS Insurance and subject to the South African foreign exchange regulations and other relevant legislation as amended from time to time. PPS Insurance assumes no responsibility or liability to inform the policyholder of any changes in such regulations and legislation.

**Indemnity:** Please note that PPS will not be held liable for incorrect payments if the account information supplied is incorrect. By signing this form, the policyholder indemnifies PPS and holds PPS harmless against any losses, liabilities, claims, charges, expenses, costs or any other actions or demands of whatever nature, which could or might be suffered or incurred by the policyholder or any third party whether directly or indirectly, caused by and/or arising out of the payment into the above account.

**DETAILS FOR POLICYHOLDER 2****Personal particulars:**

Full names:

Surname:

ID/Passport number (if no ID):

Cell phone:

E-mail:

**Bank account details:**

**NOTE:** Financial governance requires that all benefits regarding member claims must be settled to the same account from which your premiums are paid (**premium-paying account**). Please note that this is an improved security measure to mitigate financial risks for claiming policyholders.

Please provide alternative bank details below if you cannot receive payment to your premium-paying account for any reason. Changing the account to which claim benefits are paid will require additional diligence and proof. **The required additional diligence will take an additional five working days before payment can be made.**

If you must change your banking details, please include the required proof together with this claim form.

**I understand this note and request PPS to:** (Select the appropriate option)

1. Pay any benefits due to my existing premium-paying account. ☐
2. Use the new account details below to pay any benefits due to me. ☐

2.1. Please update my premium-paying account to the new details below for future premium payments. YES ☐ NO ☐

Name of account holder:

Name of bank:

Account number:

Branch code:

Type of account:

Percentage of business ownership:  %

**If you have selected option 2 above, please provide PPS with proof of account and certified proof of the account holder's identity. The accepted proof of account is a bank-stamped verification letter on the bank's letterhead not older than three months. PPS cannot make changes to this account without the required proof.**

**For payments into an international bank account:**

IBAN no:

Bank's physical address:

**Foreign bank accounts:** Please note that in terms of the PPS Provider™ Policy, premiums from the policyholder should be paid from a South African bank account and benefits to the policyholder should also be paid into a South African bank account, in South African currency. Accordingly, PPS Insurance assumes no responsibility or liability whatsoever in the event the policyholder pays premiums from a foreign bank account, or the policyholder nominates a foreign bank account for receipt of policy benefits. Furthermore, any payment to and from PPS Insurance involving a foreign bank shall be at the sole discretion of PPS Insurance and subject to the South African foreign exchange regulations and other relevant legislation as amended from time to time. PPS Insurance assumes no responsibility or liability to inform the policyholder of any changes in such regulations and legislation.

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**DETAILS FOR POLICYHOLDER 3****Personal particulars:**

Full names:

Surname:

ID/Passport number (if no ID):

Cell phone:

E-mail:

**Bank account details:**

**NOTE:** Financial governance requires that all benefits regarding member claims must be settled to the same account from which your premiums are paid (**premium-paying account**). Please note that this is an improved security measure to mitigate financial risks for claiming policyholders.

Please provide alternative bank details below if you cannot receive payment to your premium-paying account for any reason. Changing the account to which claim benefits are paid will require additional diligence and proof. **The required additional diligence will take an additional five working days before payment can be made.**

If you must change your banking details, please include the required proof together with this claim form.

**I understand this note and request PPS to:** (Select the appropriate option)

1. Pay any benefits due to my existing premium-paying account. ☐
2. Use the new account details below to pay any benefits due to me. ☐

2.1. Please update my premium-paying account to the new details below for future premium payments. YES ☐ NO ☐

Name of account holder:

Name of bank:

Account number:

Branch code:

Type of account:

Percentage of business ownership:  %

**If you have selected option 2 above, please provide PPS with proof of account and certified proof of the account holder's identity. The accepted proof of account is a bank-stamped verification letter on the bank's letterhead not older than three months. PPS cannot make changes to this account without the required proof.**

**For payments into an international bank account:**

IBAN no:

Bank's physical address:

**Foreign bank accounts:** Please note that in terms of the PPS Provider™ Policy, premiums from the policyholder should be paid from a South African bank account and benefits to the policyholder should also be paid into a South African bank account, in South African currency. Accordingly, PPS Insurance assumes no responsibility or liability whatsoever in the event the policyholder pays premiums from a foreign bank account, or the policyholder nominates a foreign bank account for receipt of policy benefits. Furthermore, any payment to and from PPS Insurance involving a foreign bank shall be at the sole discretion of PPS Insurance and subject to the South African foreign exchange regulations and other relevant legislation as amended from time to time. PPS Insurance assumes no responsibility or liability to inform the policyholder of any changes in such regulations and legislation.

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**DETAILS FOR POLICYHOLDER 4****Personal particulars:**

Full names:

Surname:

ID/Passport number (if no ID):

Cell phone:

E-mail:

**Bank account details:**

**NOTE:** Financial governance requires that all benefits regarding member claims must be settled to the same account from which your premiums are paid (**premium-paying account**). Please note that this is an improved security measure to mitigate financial risks for claiming policyholders.

Please provide alternative bank details below if you cannot receive payment to your premium-paying account for any reason. Changing the account to which claim benefits are paid will require additional diligence and proof. **The required additional diligence will take an additional five working days before payment can be made.**

If you must change your banking details, please include the required proof together with this claim form.

**I understand this note and request PPS to:** (Select the appropriate option)

1. Pay any benefits due to my existing premium-paying account. ☐
2. Use the new account details below to pay any benefits due to me. ☐

2.1. Please update my premium-paying account to the new details below for future premium payments. YES ☐ NO ☐

Name of account holder:

Name of bank:

Account number:

Branch code:

Type of account:

Percentage of business ownership:  %

**If you have selected option 2 above, please provide PPS with proof of account and certified proof of the account holder's identity. The accepted proof of account is a bank-stamped verification letter on the bank's letterhead not older than three months. PPS cannot make changes to this account without the required proof.**

**For payments into an international bank account:**

IBAN no:

Bank's physical address:

**Foreign bank accounts:** Please note that in terms of the PPS Provider™ Policy, premiums from the policyholder should be paid from a South African bank account and benefits to the policyholder should also be paid into a South African bank account, in South African currency. Accordingly, PPS Insurance assumes no responsibility or liability whatsoever in the event the policyholder pays premiums from a foreign bank account, or the policyholder nominates a foreign bank account for receipt of policy benefits. Furthermore, any payment to and from PPS Insurance involving a foreign bank shall be at the sole discretion of PPS Insurance and subject to the South African foreign exchange regulations and other relevant legislation as amended from time to time. PPS Insurance assumes no responsibility or liability to inform the policyholder of any changes in such regulations and legislation.

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**DETAILS FOR POLICYHOLDER 5****Personal particulars:**

Full names:

Surname:

ID/Passport number (if no ID):

Cell phone:

E-mail:

**Bank account details:**

**NOTE:** Financial governance requires that all benefits regarding member claims must be settled to the same account from which your premiums are paid (**premium-paying account**). Please note that this is an improved security measure to mitigate financial risks for claiming policyholders.

Please provide alternative bank details below if you cannot receive payment to your premium-paying account for any reason. Changing the account to which claim benefits are paid will require additional diligence and proof. **The required additional diligence will take an additional five working days before payment can be made.**

If you must change your banking details, please include the required proof together with this claim form.

**I understand this note and request PPS to:** (Select the appropriate option)

1. Pay any benefits due to my existing premium-paying account. ☐
2. Use the new account details below to pay any benefits due to me. ☐

2.1. Please update my premium-paying account to the new details below for future premium payments. YES ☐ NO ☐

Name of account holder:

Name of bank:

Account number:

Branch code:

Type of account:

Percentage of business ownership:  %

**If you have selected option 2 above, please provide PPS with proof of account and certified proof of the account holder's identity. The accepted proof of account is a bank-stamped verification letter on the bank's letterhead not older than three months. PPS cannot make changes to this account without the required proof.**

**For payments into an international bank account:**

IBAN no:

Bank's physical address:

**Foreign bank accounts:** Please note that in terms of the PPS Provider™ Policy, premiums from the policyholder should be paid from a South African bank account and benefits to the policyholder should also be paid into a South African bank account, in South African currency. Accordingly, PPS Insurance assumes no responsibility or liability whatsoever in the event the policyholder pays premiums from a foreign bank account, or the policyholder nominates a foreign bank account for receipt of policy benefits. Furthermore, any payment to and from PPS Insurance involving a foreign bank shall be at the sole discretion of PPS Insurance and subject to the South African foreign exchange regulations and other relevant legislation as amended from time to time. PPS Insurance assumes no responsibility or liability to inform the policyholder of any changes in such regulations and legislation.

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## AUTHORISATION TO COMMUNICATE WITH FINANCIAL ADVISER

I specifically authorise PPS Insurance to communicate any requirements to my financial adviser which may entail providing information regarding my current medical condition. YES ☐ NO ☐

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NO

[illegible][illegible]

## DECLARATION

The Professional Provident Society (PPS) Holdings Trust No IT 312/2011 is a Registered South African Trust. The Professional Provident Society Insurance Company Limited Reg. No 2001/017730/06 is a licensed insurer conducting life insurance business, a licensed controlling company and an authorised financial services provider. Any reference to PPS in this form means PPS Insurance.



I/We  (member full name and surname) and ID number:

authorise PPS Insurance to:

- a) Access any information deemed necessary to assess any insurance risk or to consider a claim. I understand that if I choose not to provide this information, PPS will not be able to assess the claim for insurance.
- b) Share with other insurers and their representative body any information in the possession of PPS Insurance, either directly or through a database operated by, or for insurers as a group and authorise PPS to also collect my personal information from other insurers as exchange of information helps to save costs and combat fraud. PPS can further process any such information in accordance or compatible with the purpose for which it was collected.
- c) Disclose any information to the PPS Holdings Trust, PPS Insurance's subsidiaries and affiliates or other persons provided that it is necessary to properly underwrite, manage, assess the claim or service the policy, policy assets or myself. PPS Insurance may be required to disclose my information to regulatory or government agencies.
- d) Obtain credit information from any person or institution.

### AND

I/We understand that I can request details of the information held by my insurer and request its correction where appropriate.

### AND

I/We authorise a doctor, hospital, medical aid or any other person to provide this information to PPS. PPS Insurance will always do its utmost to prevent any unauthorised disclosure of your personal information. PPS will adhere to any laws governing the protection of (and access to) personal information and will not use your information for any purpose not provided for in your Policy Contract.

Signed at  on this  day of  20

### Signatures:

#### Life-insured:

\*If applicable

Policyholder 1:

Policyholder 2:

Policyholder 3:

Policyholder 4:

Policyholder 5:

### DISCLAIMER:

By submitting this form electronically, you acknowledge that your electronic signature holds the same legal weight as a handwritten signature. For authorised electronic signature details, contact your PPS-accredited financial adviser or e-mail [memberservices@pps.co.za](mailto:memberservices@pps.co.za). Using unauthorised electronic signatures is at your own risk and PPS Insurance disclaims liability for any related issues.