

# Foresters Life Insurance and Annuity Company

## Claimant's Statement Instructions



Raritan Plaza I, P.O. Box 7836 . Edison, New Jersey 08818-7836 . [www.forestersfinancial.com](http://www.forestersfinancial.com)

Proceeds will be paid to the named beneficiary(ies) when the forms listed below are received at the Administrative office, along with any additional requirements.

**1. Certified Copy of the Death Certificate.** Please note, we must keep one certified copy of the death certificate on file.

**2. Claimant's Statement.** This form is to be signed by the person entitled to receive the proceeds of the policy. If there is more than one person, a separate form will need to be furnished for each.

Please refer to the chart below for additional requirements.

### PROCEEDS PAYABLE TO:

### STATEMENT SIGNED BY:

### ADDITIONAL REQUIREMENTS:

Estate of the Deceased	Executor or Administrator of the Estate of the Deceased	Letters Testamentary or Letters of Administration
Named Beneficiary of legal age	Named Beneficiary	None
Minor or Mentally Incompetent Beneficiary	Guardian	Letters of Guardianship
Trust	Trustee	Evidence that the Trust is in effect and of qualification of Trustee. (Certificate of Authority)
Contingent Beneficiary	Contingent Beneficiary	Evidence of death of all primary beneficiaries
Assignee	Assignee	If a Collateral Assignment, documentation of the amount claimed by the Assignee, assented to by the beneficiary.

When the proceeds, or any part of them, are payable to "children" or others of a class, a sworn statement must be furnished, giving the names and the dates of birth of each. If any have died, a death certificate must be provided.

If death occurs outside the United States or Dominion of Canada, the Claimant's Statement and death certificate must be certified by a diplomat or consulate representative of the United States.

### **For Life Claims**

When an official inquiry as to cause of death has been made, a copy of the verdict or findings, duly certified, must be furnished with this statement.

### **Spousal Exception for Annuities**

**Please contact the Administrative Office at 1-800-832-7783 to see if you qualify for this exception.** If you qualify, you can continue the contract under your name. This event will be treated as a change of ownership due to death without incurring a taxable event, and a claimant statement will not be necessary unless you decide otherwise. Please refer to the Request for Change of Ownership instructions for all the requirements if applicable.