



## TERMINAL PROGNOSIS ADVANCE PAYMENT: CLAIM FORM

Serving Member

☐

Partner of  
Serving Member

☐

Retired Member

☐

Partner of  
Retired Member

☐

Title: .....

Sex (Male/Female): .....

Full name: .....

Address: .....

.....

Telephone/Mobile Number: .....

Email: .....

Date of Birth: .....

**For all Claims:**

Serving/Retired Member's Collar/  
Payroll Number:

.....

**For Partner Claims:**

Serving/Retired Member's  
Full Name:

.....

**For Partner Claims:**

Serving/Retired Member's  
Date of Birth:

.....

**For Retired Member and Partner of**

**Retired Member Claims:**

Retired Member's Date of Retirement:

.....



**1. Please describe your illness in full (continue on a separate sheet if required):**

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**2. On what date did you first note symptoms?**

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**3. On what date was your condition/illness diagnosed as terminal?**

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**4. Please provide full details including dates of any tests/investigations which have been carried out (please provide name, department, reference (if appropriate) and address of the institution where such tests were performed):**

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**5. What treatment are you currently receiving?**

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**6. Have you previously suffered from the same or any similar condition? Please provide full details to include dates:**

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**7. Please provide the name and address of your General Practitioner:**

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**8. When did you first consult your General Practitioner for this condition?**

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**9. Please provide the name and address of the doctor(s)/specialist(s) consulted for this condition, or details of hospitalisation. Please indicate who would be the most appropriate to contact:**

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**10. Please provide any further details you feel may help us when assessing your claim:**

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**I certify that the answers and statements provided above are full and true to the best of my knowledge and belief and that I have not withheld any relevant information from Risk Assurance Management Limited or the underwriter, The Shepherds Friendly. If you are unsure as to whether any information should be given, you should provide it.**

Shepherds Friendly is a trading name of The Shepherds Friendly Society Limited which is an incorporated Friendly Society under the 1992 Friendly Societies Act No. 240F. Authorised by the Prudential Regulation Authority and regulated by the Financial Conduct Authority and the Prudential Regulation Authority. FS Registration Number 109997.

**Claimant's signature:**

**Full Name:**

**Date:**

### **Access to Medical Reports**

It may be necessary for us to obtain medical reports to support your claim. Before we can ask any doctor that you have consulted to complete a report, we need your permission under the Access to Medical Reports Act 1988. Your rights under the Act are as follows:

- a) You do not have to give your consent, but if you do not we may be unable to proceed.
- b) You can ask to see the report before the doctor returns it to us. If you do, we shall tell the doctor to retain the report for 21 days so that you can arrange to see it. If you have not made arrangements to see the report within this time, your doctor will send the report to us.
- c) If you choose not to see the report at this stage, you may ask the doctor for a copy within 6 months of it being sent to us. A duplicate report can be sent to your doctor on request should you wish to see it at a later date.
- d) If you consider any aspect of the report to be incorrect or misleading, you may ask the doctor to amend it. If your doctor refuses to make the amendments, you may ask them to attach a statement outlining your views, which will then accompany the report.
- e) Your doctor can withhold access to the report if they feel that it would cause physical or mental harm to you or others.
- f) Your medical report will contain details of relevant consultations, treatment, operations, investigations and test results that you have undergone at any surgery, hospital or clinic. Your consent will give Risk Assurance Management Limited access to this information.

If you have any questions regarding your rights under the Act or any questions relating to the process of obtaining, assessing or storing medical information, please write to the Compliance Officer at our Head Office.

Please tick one box

I wish to see reports before they are sent to the Company.

☐

I do not wish to see reports before they are sent to the Company.

☐



### **Data Protection**

I understand that the use of any information provided by me for the operation of this insurance is for the process of underwriting, administration, claims management, handling customer concerns and the detection, prevention and investigation of fraud.

I understand that in order to do this the information may be shared with the underwriter (The Shepherds Friendly Society Limited), reinsurers, insurance intermediaries and service providers who are involved in either the operation of insurance which covers members or the member's benefits arrangements provided by the Company in accordance with their Data Privacy Notice shown on their website: [www.ram-ltd.co.uk](http://www.ram-ltd.co.uk) and the underwriter's Privacy Notice: [www.shepherdsfriendly.co.uk/privacy-policy](http://www.shepherdsfriendly.co.uk/privacy-policy)

I understand the data will be processed fairly and securely and the details will be stored in line with UK Data Protection Law and will not be kept longer than necessary.

I understand that the data I have provided in relation to this insurance will be processed in accordance with the requirements of the General Data Protection Regulation.

### **Declaration**

I hereby certify that the information provided is truthful, accurate and complete and I agree that any statement made by me and found by Risk Assurance Management Limited or the underwriter, The Shepherds Friendly, to be false or inaccurate could affect how much is paid out on the claim and could mean the claim is not paid out at all.

I authorise any doctor, other medical practitioner, or any other person to provide Risk Assurance Management Limited, their agents or subcontractors with all information as requested by the company or its representative in consideration of the claim.

Copies of this declaration will be legally valid.

I confirm I have read and understood the information in this claim form including the section relating to:

- Access to Medical Reports Act 1988
- Data Protection
- The Declaration

I understand that Risk Assurance Management Ltd may ask other insurers for information to check the information I have given.

**Claimant's signature:**

**Full Name:**

**Full Address (including postcode):**

**Date:**



### **Trustees Declaration**

We hereby apply to Risk Assurance Management Limited and the underwriter, The Shepherds Friendly Society Limited, for the Terminal Prognosis Advance payment being claimed. We declare that the claimant is a Member of the Scheme and paying premiums up to date, and the particulars provided are correct to our knowledge and belief. We confirm that payment of this claim will be in full and final settlement of 20% of the Member's current applicable Life Assurance Benefit.

#### **TO BE COMPLETED BY THE TRUSTEES**

Terminal Prognosis Advance payment being claimed (£): .....

Date Claimant joined the Scheme: .....

For all claims - Date Serving/Retired Member joined the Force: .....

For Serving Member claims - Date last day Actively at Work: .....

For Retired Member and Partner of Retired Member claims - Date of Retired member's Retirement:  
.....

**This form must be signed by a Trustee of the Scheme or a duly authorised person on behalf of the Trustees.**

As part of our claims process, we must be able to verify the signature against specimen signatures we hold on file.

Authorised Signature: .....

Print Name: .....

Position: .....

Date: .....



Payments will not be made to any other parties than the Trustees of the Scheme who are:-

<b>The Trustees of the:</b>
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Please ensure that the bank account details provided below are full and accurate – failure to do so may delay settlement of the claim.

<b><u>Trustees Bank Details:</u></b>	
<b>Bank Account Name:</b>	.....
<b>Bank Account Number:</b>	.....
<b>Bank Sort Code:</b>	.....
<b>Bank Name:</b>	.....
<b>Bank Address:</b>	.....
	.....