MANDATUM

CLAIM FOR COMPENSATION
PAYABLE IN THE EVENT OF DEATH

Policy number:

Information about the policy

Policyholder	Policy number
Policyholder's personal identity code	
Insured party (the deceased person)	Insured party's personal identity code
Cause of death	Date of death

Contact person's details

Name	Phone number
Email address	

Beneficiaries' details

Every beneficiary must fill in their information on the claim form, sign the form and attach a copy of a document proving their identity, such as a passport, identification card or driving licence. If the beneficiary is not a citizen of Finland, a passport is always required to verify identity.

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Policy number:

Name of beneficiary	Personal identity code
Country of birth	Citizenship/Citizenships ☐ Finland ☐ U.S.A ☐ Other country:
Street address	Postal code and town/city
Email address	Phone number
Beneficiary's family relationship with the deceased person	
☐ I am interested in investing. Please contact me.	
Name of the bank account owner and account number (in IBAN format)	Bank's BIC code, if the bank account is in a foreign bank

Background information

Mandatum is required to identify its customers and to be sufficiently familiar with their customers' background. Mandatum uses the requested information to prevent money laundering and the funding of terrorism and to meet the statutory obligations concerning the exchanging of tax information. Read more about customer due diligence at www.mandatum.fi/knowyourcustomer and the processing of personal data at www.mandatum.fi/en/footer/privacy/. In order for us to meet our obligation, we kindly ask you to carefully fill in this form.

In which countries are you generally liable to pay tax?*		
☐ Finland		
☐ U.S.A.**		Tax identification number:
☐ Other country	Country of taxation:	Tax Identification Number:
	Country of taxation:	Tax Identification Number:

* Mandatum has an obligation to know in which countries its customers are generally liable to pay tax. The general tax liability is usually determined according to the person's main place of residence or similar residence. As a rule, real estate holdings abroad or pension income or capital gains from abroad do not give rise to general tax liability in the country in question.
Each country has its own tax identification number practices, which the country's tax authority uses to identify its taxpayers. The Tax Identification Number (TIN) is required information if you are generally liable to pay tax in a country besides Finland. More information is available at: www.vero.fi.
** A citizen of the U.S.A (incl. dual and triple citizenship) is liable to pay tax in the U.S.A. regardless of the place of residence. Liability to pay tax to the U.S.A can also arise from a residence permit or work permit (Green Card) or normal residence in the U.S.A. If you were born in the U.S.A., the U.S.A. is usually considered to be your tax residency. If necessary, you can submit additional information in the section Additional information.

Are you or is a member of your family or your business partner a politically exposed person?
(a high-standing official or holding an important political position)
☐ No ☐ Yes*
*If the answer is yes, provide more details about the matter in the section Additional information. More information about the processing of personal data is available at www.mandatum.fi/en/footer/privacy/

Additional information

I hereby certify that the information I have provided is correct.
Beneficiary's signature (for minors, signature of parents/guardians) and date