



**Generali Life Assurance
Philippines, Inc. (GLAPI)**
10th Floor Petron Mega Plaza
Gil Puyat Avenue, Belair,
Makati City Philippines 1209
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generali.com.ph

CLAIMANT'S STATEMENT DISABILITY CLAIM

CLAIM REQUIREMENTS: Please refer to the annex or visit <https://www.generali.com.ph/claims-filing/>

INSURED'S INFORMATION: Kindly ensure providing complete and accurate information below.

Last Name		First Name		Middle Name		Suffix	
Address							
Date of Birth (MM/DD/YYYY)		Age		Place of Birth			
Nationality		Civil Status		Sex		ID Type and No.	
Occupation		Name of Employer		Office Address		Employment / Membership Period (From – To)	
(Home) Telephone Number		Mobile Number		Email Address			

DETAILS OF PRESENT CONDITION:

What Disability are you suffering from: _____

Date symptom/s was/were first noticed: _____ Symptom/s: _____

Date of First / Initial Consultation: _____ Diagnosis: _____

When were you prevented from attending to your usual occupation: _____

When were you considered totally and permanently disabled: _____

Describe briefly your usual daily routine activity/ies: _____

Have you done any work activities after you gave up your usual occupation? If so, kindly provide details below:

Has there been any improvement in your condition? If so, please describe: _____

Expected date of return to usual occupation: _____

Please indicate below the name and address of all Physicians, including medical facilities, where Insured had record/s of consultation/s and confinement/s related to the Accident:

Date of Consultation / Confinement	Name of Physician	Hospital or Clinic Name / Address	Diagnosis / Treatment / Procedure

By filling the table above, you authorize GLAPI to obtain an investigative report from its duly authorized inspection agency or independent medical practitioner, which will provide any pertinent information concerning the Disability claim. GLAPI may seek second opinion from other medical experts or specialists to confirm the diagnosis and extent of the injury. This ensures that the claim is based on accurate and comprehensive medical information.

PAYOUT INSTRUCTION: Please submit a copy of any account proof such as Passbook or deposit slip. Account proof should show Bank Name, Account Name and Number.

Bank Name	Bank Address	Bank Account Name	Bank Account Number
<p><i>For Foreign Bank Accounts, please fill out the information below. Please note, as well, that fund transfer is allowed only to the bank account of the Insured and if the Insured agrees to shoulder bank charges, if applicable.</i></p>			
Swift Code		Type of Account / Currency	

The undersigned assumes full responsibility for the accuracy of the bank account information provided above. Undersigned / Insured shall bear the consequences or delay resulting from any error(s) in the bank account information provided.

CLAIMANT'S DECLARATION AND AUTHORIZATION PRIVACY PROVISIONS AND CONSENT

To facilitate the assessment and processing of your Disability claim, and to ensure compliance with the terms of the Group Life Insurance Policy under which you are the insured, Generali Life Assurance Philippines, Inc. (GLAPI) is committed to providing you with transparent information regarding the processing of your Personal Data. This transparency enables you to understand the nature of the data we collect and how it will be processed, empowering you to maintain control over your Personal Data and provide informed consent. We are dedicated to safeguarding the confidentiality and security of all personal information, including sensitive personal information, through limiting access and maintaining appropriate organizational, technical, and physical safeguards.

As the Personal Information Controller responsible for processing your Personal Data, GLAPI ensures that you receive the necessary assistance in processing your Disability claim. Our latest privacy policy is available online at any time by visiting: <https://www.generali.com.ph/privacy-policy/>.

In the course of our processes, GLAPI may collect, process, and disclose various types of personal information about you, such as your name, sex, address, contact details, citizenship, or occupation. Additionally, to ensure you receive the benefits covered by the Group Life Insurance Policy according to the insurance policy and in compliance with applicable regulations, GLAPI may gather, handle, and disclose sensitive personal information, such as dates of birth, civil status, and details related to your health as an insured individual. This includes medical records (including symptoms, diagnoses that led to disability, and treatment details), place, date, and cause of disability, physicians/medical institutions where you had records of consultations/confinements, and any other relevant information required for processing the Disability claim. GLAPI may need to collect medical evaluations and reports stating the cause and extent of the Disability, and the anticipated prognosis. These evaluations are critical for assessing the validity of your claim.

By signing this document, you authorize GLAPI to access and obtain copies of your records for the purpose of evaluating the Disability claim. This authorization extends to any physician, medical practitioner, hospital, clinic, or other medical facility, as well as insurance or reinsurance companies, entities, or employers, possessing information relevant to the diagnosis, treatment, results, and prognosis of your physical or mental condition.

You grant GLAPI permission to collect any necessary information or records to process your claim. This authorization encompasses all records containing medical or non-medical data, including but not limited to mental and dental care, drug or alcohol use, prescribed medications, information regarding communicable diseases, and any details regarding employment and insurance coverage.

It is understood that by virtue of this authorization, any such physician, medical practitioner, hospital, clinic, or other medical facility or entities or employers or any and all members of its staff shall be released from any responsibility or obligation in connection with the release of such records or information.

Furthermore, you authorize GLAPI to obtain an investigative report from its duly authorized inspection agency or independent medical practitioner, which will provide any pertinent information concerning the Disability claim. GLAPI may seek second opinions from other independent medical experts or specialists to confirm the diagnosis and the extent of the disability. This ensures that the claim is based on accurate and comprehensive medical information.

GLAPI may utilize the Personal Data collected for various purposes, including: (a) Verify your identity and status as the insured, including assessing the validity and accuracy of the claim, determining coverage and benefits under the insurance policy, communicating with claimant(s) and any authorized parties involved regarding the claim, investigating the circumstances surrounding the claim (including medical history and cause of disability), and evaluating medical records and other relevant documentation provided by the claimant(s). This also involves coordinating with medical professionals or institutions for verification and assessment purposes. This may imply cross-referencing medical records, confirming the dates and details of treatments, and ensuring that all information is consistent and accurate; (b) Ensure timely and accurate processing of your insurance claim, including calculating and disbursing insurance benefits to the rightful individual; (c) Understand your satisfaction with our claims-handling process and gather feedback through voluntary satisfaction surveys; (d) Inform you about GLAPI's products and services, including any insurance options available to you; (e) Ensure compliance with applicable laws, regulations, and obligations; (f) Identify, investigate, and prevent financial crimes such as money laundering and fraudulent claims related to Disability claim; (g) Handle any disputes or inquiries related to the claim; (h) Maintain internal record-keeping and conduct internal control and audit purposes.

Please note that the sharing of Personal Data shall only occur when strictly necessary and shall be limited to the purposes stated above. Therefore, your Personal Data shall solely be utilized by GLAPI employees. Additionally, exclusively for the fulfillment of the aforementioned purposes, we may need to share

your Personal Data on a strict need-to-know basis with third parties, including:

- Medical facilities, diagnostic and testing centers, rehabilitation centers, attending physicians or medical examiners may need to disclose any information and related documents required for processing your insurance claim, including investigation into the cause of disability.
- Other insurers involved in the coordination of benefits or subrogation processes.
- Duly authorized inspection agency or independent medical practitioner.
- Other accredited third-party service providers and vendors or institutions necessary for ensuring timely processing of the Disability claim and disbursing benefits to you as the Insured (including financial institutions facilitating payments related to the claim).
- Reinsurance companies providing coverage to the insurer.
- Third-party service providers and vendors necessary for the purposes of preventing financial crimes (including combatting insurance fraud) and ensuring compliance with applicable laws and regulations. Additionally, law enforcement agencies may be involved in cases related to fraud or criminal activity.
- Medical Information Database administered by the Philippine Life Insurance Association (PLIA) and accessible to life insurance companies for purposes allowed under the Insurance Commission Circular Letter No. 2016-54, Loan Database administered by the Credit Information Corporation, and other databases administered by similar agencies.
- Our government or regulatory bodies or any person to whom GLAPI must disclose data: (a) under a legal and/or regulatory obligation; or (b) pursuant to an agreement between GLAPI and the relevant government regulatory body or other person.
- Data storage providers hosting digital records for archival and retrieval purposes.
- External auditors or consultants conducting reviews or audits of claims processes to ensure compliance and accuracy in the claims handling procedures.

We will not disclose any information pertaining to the life insurance claim to any other third party without your explicit authorization. This authorization may be provided, for example, to support you during the processing of the claim, by an assisting party, through a separate authorization form (different from this one).

These third parties may be situated outside the Philippines. However, the transfer of your Personal Data will adhere to applicable laws and international agreements, alongside suitable safeguards. For instance, our service providers must safeguard your Personal Data in accordance with GLAPI's privacy principles, policies, and best practices.

Generally, we retain your Personal Data only for the duration necessary to fulfill the purposes for which it was collected. Hence, unless specific requirements necessitate an extended retention, information contained in the Disability claim documents will be retained for a maximum of 10 years from its settlement, while details pertaining to the claim itself (stemming from these Disability claim requests), as part of GLAPI's obligations, will be retained for 10 years from the termination of the Group Life Insurance Policy, without loss of any of your rights enshrined under the Data Privacy Act.

GLAPI and everyone involved in processing your Personal Data respect your data privacy rights. As per applicable law, you have the right to:

- Access and get information about your personal data that GLAPI holds about you;
- Obtain your personal data in an electronic format;
- Correct or update your personal data so that it is always accurate;
- Withdraw your consent at any time where your personal data has been processed with your express consent;
- Restrict or object the processing of your personal data in certain circumstances;
- Delete your personal data from our records upon your request;
- File a complaint with us and/or the National Privacy Commission and the right to be indemnified for damages due to a violation of your rights as a customer; or
- Data portability through which you may obtain and electronically move, copy, or transfer your data securely for further use.

If you wish to access, rectify, or update your Personal Data, exercise your rights, or address any inquiries or concerns, please email GLAPI's Data Protection Officer (GLAPI's DPO) at privacy@generali.com.ph. For further information on how GLAPI manages your Personal Data, please also contact GLAPI's DPO. Suggestions or comments regarding this 'Privacy Provisions and Consent' can also be directed to GLAPI's DPO. You can reach out by email or mail at GLAPI's office address 10th Floor, Petron Mega Plaza Building, 358 Sen. Gil Puyat Avenue, Makati City.



By signing below, you indicate that you have read, understood, acknowledged, and agreed to provide your consent for the collection, use, processing, and disclosure of your Personal Data, as well as agreeing to be bound by the terms outlined in this 'Privacy Provisions and Consent'. You agree to the purposes for which your Personal Data will be processed and the parties to whom it may be disclosed. While it is at your discretion what information you provide, it is understood that withholding or providing false information may have consequences. You also have the right to rectify any inaccuracies in your information.

By accepting these terms, you consent to receiving communications, offers, or promotions from GLAPI that may be of interest to you, even after the eventual termination of the insurance policy under which you are the Insured. If you no longer wish to receive these communications, you can revoke your consent at any time by contacting GLAPI's Data Protection Officer (DPO) at privacy@generali.com.ph.

This consent remains valid until you choose to alter or revoke it by providing written notice to GLAPI's DPO at privacy@generali.com.ph. Please note that withdrawing your consent may impact GLAPI's ability to respond to a claim. As anticipated, GLAPI may use your Personal Data to send you offers or information about our products and services that may be of interest to you. If you do not wish to receive such information, please provide written notice to GLAPI's DPO.

A photocopy or electronic copy of this authorization will be as valid as the original.

I, _____, of legal age, Filipino Citizen, with postal address at
(Insured / Claimant's Name)

_____ on oath hereby attest that:

The foregoing information provided in this Claimant's Statement – Disability Claim Form are true, correct and complete to the best of my knowledge and belief.

For and in consideration of the insurance proceeds received, I hereby release and forever discharge GENERALI LIFE ASSURANCE PHILIPPINES INC., its directors, officers, shareholders, employees, agents, and its successors-in-interest or assigns from any and all claims, demands, cause or causes of action in law or in equity that I may claim to hold, related to my claim for insurance proceeds.

Signed this _____ day of _____ year _____ in _____.

Signature above Full Name of Insured / Claimant

SUBSCRIBED AND SWORN to me before this _____ of _____ year _____ in _____
affiant exhibiting to me his/her _____ as competent proof of identity.

(ID Type and Number)

NOTARY PUBLIC

Reminders:

- *The issuance of this form does not constitute an approval of claim or imply an admission of liability in any way.*
- *The Insured's Disability should be total and permanent and must continue uninterrupted for at least six (6) months. The Disability should wholly prevent the Insured Individual from engaging in any business or occupation or performing any work, physical or mental, for compensation, profit or gain.*
- *The claim will not be processed unless accompanied by the duly executed Claimant's Statement and Attending Physician's Statement form and other documentary requirements.*
- *We remind that the Insured Person has a duty of disclosure of a material fact and this duty continues throughout the life of the Policy. GLAPI will void the Policy if cover has been obtained by any misrepresentation, misdescription, use of a fraudulent document or non-disclosure of any material fact. If you are in any doubt as to whether a fact is material or not, please contact us for clarification.*
- *By submitting this claim, you declare that all information and documentation submitted are true to the best of your knowledge, complete and correct.*
- *Any fraudulent request will be refused and, accordingly to its gravity, can be reported to the police or any competent authority. Please note that any attempt to mislead may result in prosecution (max. fine worth twice the amount the person claimed and imprisonment of up to two years, Art. 251 of the Amended Insurance Code).*