

Part 3: Payment Instructions

A. Please select the preferred payment option.

Funeral Funds

- Bank account in the name of the Estate¹/Executor²/Solicitor's Trust Account.
- Funeral firm as funeral expenses have not been paid. Tax invoice from Funeral Firm is attached.
Note: If any excess balance remains a separate payment will be made to the bank account in the name of the estate.
- Individual who has paid the funeral expenses. Receipt from Funeral Firm is attached.
Note: If any excess balance remains a separate payment will be made to the bank account in the name of the estate.
- Nominated Beneficiary(s) of the policy as previously registered with Foresters.
- Spouse payment.
Note: Only applicable for Insurance Benefit Funds.

Investment or Education Funds

- Bank account in the name of the Estate¹/Executor²/Solicitor's Trust Account.
- Nominated Beneficiary(s) of the policy as previously registered with Foresters.

B. Please complete the payment details below.

Payee 1

Account Holder Name

Bank

BSB Number (Must be 6 Digits) Account Number

Payee 2 (if applicable)

Account Holder Name

Bank

BSB Number (Must be 6 Digits) Account Number

1 Payment to the estate can only be made if the Bank account is in the name of the deceased's estate

2 Payment to the executor of the estate can only be made if a copy of the Will and Testament is provided to Foresters.

Part 4: Declaration

In making this claim I confirm I am the legal representative of the deceased and the information provided is true and correct. I have included the following documentation with this claim (please tick all that apply):

- Copy of Death Certificate/Medical Cause of Death
- Tax Invoice from funeral firm for the funeral expenses of the deceased
- Receipt from the funeral firm showing payee of funeral expenses of the deceased
- Copy of the Will and Testament

Signature of Claimant
named in Part 2

Date

Name of Additional
Claimant

Signature of
Additional Claimant

Date

Return Details

RETURN BY EMAIL

claims@forestersfinancial.com.au

OR

RETURN BY POST

PO Box 7702
Melbourne VIC 3004

Our privacy policy covers how we handle your personal information and is available at www.forestersfinancial.com.au/privacy or by contacting us.

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