



JARDINE LLOYD THOMPSON

## FUNERAL BENEFIT APPLICATION FORM



(The issue of this form is not an admission of liability)

Trust Name: **JLT (CAAW) Discretionary Trust** ABN 98 780 034 885

JLT Discretionary Trust and Excess of Loss Insurance

**This form should be completed and forwarded to -**

**SA BIRST**

**PO Box 321 UNLEY BC SA 5061**

**Telephone: (08) 8373 0122**

**Facsimile: (08) 8373 1929**

### 1. YOUR DETAILS

Full Name:

Residential Address:

State:

Postcode:

Telephone No:

Mobile No:

Facsimile No:

### 2. DECEASED DETAILS

Name of Deceased:

Address:

State:

Postcode:

Date of Birth:

Date of Death:

### DECLARATION

I, \_\_\_\_\_ of \_\_\_\_\_ hereby declare  
(Executor/Beneficiary) (Enter Address)

- That the deceased named above was an eligible person under the Trust; and
- That the amount paid represents the full and final Death Benefit entitlement and that the payment of this amount represents a full and final discharge of each and every liability to the JLT (CAAW) Discretionary Trust in respect to this claim.
- The information and answers given in this document are true and correct. No information likely to affect the acceptance of this claim has been withheld.
- I understand that this claim may be refused if any information is false, or inaccurate or concealed.

Declared at \_\_\_\_\_ this \_\_\_\_\_ day of \_\_\_\_\_

For and on behalf of -  
(Please Print Name):

Witness:

Signature:

Name:

**PLEASE ATTACH A COPY OF THE DEATH CERTIFICATE AND FUNERAL ACCOUNT OR RECEIPT  
WHEN SUBMITTING THIS CLAIM FORM**



# JARDINE LLOYD THOMPSON

ABN 69 009 098 864

## COLLECTION STATEMENT UNDER PRIVACY ACT 1988

In accordance with the Privacy Act 1988 (and subsequent amendments), we Jardine Lloyd Thompson Pty Ltd (and our subsidiaries and related entities) (JLT) draw your attention to the following:

- We may collect personal information about you by means of the enclosed document.
- We are collecting the information principally for the purpose of approaching the (re)insurance market, placing insurance, assessing and advising you on your insurance needs, claims handling or risk management (depending on your requirements). Other purposes include providing you with information about other JLT products or services. If you are proposing for or renewing insurance, the information is required pursuant to your Duty of Disclosure under the Insurance Contracts Act 1984, the Marine Insurance Act 1909 or at common law.
- The information we collect may be disclosed to third parties including but not limited to (re)insurers, insurance intermediaries, service providers, finance providers, advisers, agents and JLT related Group companies.
- By providing the information requested in the attached document, you agree to us collecting, using and disclosing your personal information as outlined in this Collection Statement.
- If you do not provide all or part of the information requested, we may be unable to process your application or provide other required services, your application for insurance may be declined or you may prejudice your insurance cover.
- You have the right to request access to, and correct, any personal information that we hold about you, subject to the provisions of the Privacy Act 1988.
- If you provide us with personal information about other individuals, you must ensure that those persons has been made aware of the above matters. Where the information collected relates to health, criminal record or other sensitive information as defined in the Privacy Act 1988, you must obtain it with the individual's consent.
- Our Privacy Policy can be made available on request or can be accessed on our website ({HYPERLINK <http://www.jlta.com.au>}).
- For further information contact your Account Executive or the JLT Privacy Officer -

Mr Heinz Steffan  
Jardine Lloyd Thompson Pty Ltd  
66 Clarence Street  
SYDNEY NSW 2000

Telephone:(02) 9290 8075