

Claimant's form – notice of death (continued)**CLAIMANT INFORMATION (continued)****(B) CLAIMANT IS TRUSTEE/LEGAL GUARDIAN FOR BENEFICIARY WHO IS A MINOR OR PERSON LACKING LEGAL CAPACITY**

Last name of beneficiary	Initial	First name	Relationship to deceased
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Address of beneficiary (street address, city, province and postal code)

Date of birth of beneficiary	Social insurance number of beneficiary	Telephone number of beneficiary	Email address
yyyy mm dd	- -	- -	

I understand that my personal information will be collected, used and shared as set out in section (E).

Date	Signature of claimant (trustee or legal guardian of beneficiary)
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(C) CLAIMANT IS EXECUTOR OR TRUSTEE OF THE ESTATE OF THE DECEASED**Executor 1**

Last name	Initial	First name	Relationship to deceased
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Address (street address, city, province and postal code)

Date of birth	Social insurance number	Telephone number	Email address
yyyy mm dd	- -	- -	

I understand that my personal information will be collected, used and shared as set out in section (E).

Date	Signature of claimant (Executor or trustee of estate)
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Executor 2

Last name	Initial	First name	Relationship to deceased
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Address (street address, city, province and postal code)

Date of birth	Social insurance number	Telephone number	Email address
yyyy mm dd	- -	- -	

I understand that my personal information will be collected, used and shared as set out in section (E).

Date	Signature of claimant (Executor or trustee of estate)
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(D) CLAIMANT IS A NON-RESIDENT

Return this form to Canada Life along with **two** valid and current pieces of personal identification information. Reliable sources of information include those listed in the chart below. A copy of the information can be provided via fax, photocopy, scan or other electronic image. Do not send the original versions to Canada Life, as they will not be returned to you. Information cannot be modified or truncated/redacted in any way.

The same piece of identification information, or source, cannot be used more than once. You must send one valid and current piece of personal information from **two** of the following columns from the chart below.

Information confirming name and date of birth (clearly shown)	Information confirming claimant's address and financial institution (clearly shown) (e.g., bank, trust company, credit union)
<ul style="list-style-type: none"> Driver's licence Passport Travel visa 	Confirmed deposit account by means of: <ul style="list-style-type: none"> Bank statement for savings or chequing account Letter from the financial entity holding the deposit account

Contact information 1-800-724-3402 or mycanadalifeatwork.com

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(E) PRIVACY

Protecting your personal information

At Canada Life, we're committed to protecting personal information and respecting your privacy. Personal information is information that either on its own or combined with other information allows an individual to be identified. This includes your name and address, as well as more sensitive information such as your health and financial records. When applicable, this includes information about other people such as your spouse, common-law partner, and children.

How we use your personal information

Your personal information is used to provide you with products and services and to improve our business operations. This includes verifying your identity, maintaining your profile, and informing you about features of the products you already have with us. It's also used to provide you with advice, evaluate your eligibility for products, price our products, collect feedback on our customer service, process claims and other financial transactions, protect you and us from risks such as cyber threats and fraud, and comply with legal obligations. If you provided your social insurance number (SIN), we'll use it for tax reporting. Your SIN is also used to link your products together and to keep your information separate from other customers with similar names.

Who we share personal information with

We share your personal information with other people and organizations who help us administer your products and provide you with services. This may include your advisor or people who work with your advisor, our Canadian subsidiaries, and other organizations that provide us services such as other financial institutions, technology suppliers, and credit reporting agencies. As part of our day-to-day business, your personal information may be communicated to government departments and agencies, and may be communicated outside your province of residence or outside Canada. We take protecting your personal information seriously and we'll never sell your personal information to anyone.

You're in control of your personal information

We respect your privacy preferences and follow them when using your personal information. At any point in your relationship with us, you can choose how your personal information is used by updating your privacy preferences through your [online account](#) or by submitting a request through our [privacy centre](#) at canadalife.com/privacy. This includes choosing whether you receive customer experience surveys, the use of your SIN for non-tax reporting purposes, and whether and how you want to receive information and offers from Canada Life using the personal information we collect from you throughout your relationship with us. You can also exercise other privacy rights through our privacy centre such as access to or correction of your personal information. If you choose to remove your consent to the collection, use and disclosure of the personal information required to serve you and meet our legal obligations, we may not be able to continue to provide you with products and services.

Want to learn more? Please visit canadalife.com/privacy.

Contact information 1-800-724-3402 or mycanadalifeatwork.com

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