Please staple original receipts/invoices here

FINANCIAL ADVICE BENEFIT REQUEST FOR PAYMENT

SOVEREIGN

Guide to reimbursement of fees for financial advice

The Financial Advice Benefit is for the reimbursement of fees you have paid for financial planning advice you have received from an accredited Adviser approved by Sovereign, after a claim payment, subject to the following conditions:

- Your policy(s) must have been issued after 1 February 2001 and a claim payment made under one of the following benefits: Living Assurance (full payment claim for life assured), Progressive Care (Severity Level 1 claim for life assured), Total & Permanent Disablement, Life Cover, Terminal Illness Benefit, Family Protection Benefit.
- You must pay for the financial planning advice within the three months following Sovereign paying a claim on one of the benefits listed below.
- Sovereign will only pay one Financial Advice Benefit of up to $2,500 (including GST) per life assured across all Sovereign policies.
- All policy owners are required to sign this form.
- Please attach proof of your payment such as a copy of your receipt(s) for payment of these fees and list below.

1 Policy details

Policy number

Life Assured / Claimant

2 Receipts/invoices enclosed

Name of accredited Adviser	Invoice Amount	Receipt Amount
	$	$
	$	$
	$	$
Total value of claim	$	$

3 Reimbursement details

Please provide bank account details for reimbursement.

Name of account

Bank	Branch number	Account number	Suffix

4 Declaration and consent

- I/We confirm that the bank account number detailed above and attached is the account that I/we want the claim proceeds to be paid into.
- I/We agree to indemnify Sovereign from and against all liability, claims, costs and expenses of whatever nature that it may suffer as a result of Sovereign agreeing to pay the Financial Advice Benefit under this policy to the account number specified.

Policy owner signature 1
(all policy owners must sign)

Date / /

Policy owner signature 2
(all policy owners must sign)

Date / /

5 Returning your form

Please check that all details are correct, then either scan and email the form and copies of the receipts/invoices to claims@sovereign.co.nz or post to Sovereign Assurance Company Limited, Private Bag Sovereign, Victoria Street West, Auckland 1142.

Sovereign House,
74 Taharoto Road,
Takapuna,
Auckland 0622

Private Bag Sovereign,
Victoria Street West,
Auckland 1142

Freephone 0800 500 195
Freefax 0800 500 196
Email claims@sovereign.co.nz
Web sovereign.co.nz

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