

MetLife Claim Submission Checklist

RE: Insured:
S.S. No.:

Please check that the requested documents are enclosed to enable us to process this claim. Failure to supply these necessary documents will delay the processing of the claim.

- Original or legible fax or copy of the enrollment forms or evidence of enrollment. (No enrollment form is necessary when the coverage is employer-paid, and all employees receive a set amount, such as \$50,000 or one times pay.) For optional/contributory coverages, original or legible fax or copy of enrollment forms or evidence of enrollment for current period and for the prior two years if Medical Evidence of Insurability (MEOI) could apply.
- An original or legible fax or copy of the most current beneficiary designation*
 - if primary beneficiary has predeceased, a photocopy of his/her death certificate is enclosed
 - Please check here if no designation on file
- Employer's statement*
 - all areas including type of coverage, coding and amount of claim are completed
 - employer statement is signed by authorized representative. The hand-written, typed, or stamped signature of the employer representative on a cover letter is also acceptable.
- Claimant Statement completed by all beneficiaries/claimants
 - Claimant Statement completed, signed and dated by each beneficiary/claimant.
- Certified Copy/Original** death certificate of insured showing the cause/manner of death.

Please complete if the beneficiary is either an estate or trust:

- A copy of a **certified** court document showing appointment of the administrator or executor for the estate.
- Tax ID # for estate/trust.

A fully completed, signed and notarized "**Certification of Trustee**" form may be required, this form can be located on eForms . A **Memorandum / Certificate of Trust** can also be accepted. There may be instances where the **entire trust** is provided with the claim submission. A notarized statement attesting to the fact that the trust is still in effect must be requested, unless the trustee is a bank or other such institution, or the trust is an irrevocable trust. A notarized statement accepting appointment of trusteeship may also be accepted, providing that it was notarized in the last 3 months.

- Remarks: