

Standard Insurance Company Life Benefits Department PO Box 2800 Portland OR 97208-2800 800.628.8600 Tel

# **Please Read Carefully**

- 1. The receipt of an Accelerated Benefit may be taxable and may affect your eligibility for Medicaid or other government benefits or entitlements. If you meet the definition of "terminally ill individual" in the Internal Revenue Code Section 101, your accelerated benefit may be non-taxable. You should consult your personal tax advisor and/or legal advisor before you apply for an Accelerated Benefit.
- 2. Your Group Policy provides a benefit which allows you to receive an early payment of a portion of your group life insurance once during your lifetime, if you meet certain requirements. Please consult the Accelerated Benefit provision of your certificate for details.
- 3. To be eligible for this benefit, you must have at least \$10,000 group life insurance and you must have a Qualifying Medical Condition as defined in the group policy. If you have questions regarding the Qualifying Medical Conditions, please contact your Employer or our office.
- 4. If you are eligible for this benefit, you may apply to receive part of your Life Insurance Benefit as an accelerated benefit.
- 5. The minimum Accelerated Benefit is \$5,000 or 10% of your group life insurance, whichever is greater.
- 6. In order to apply for the benefit, you must submit a completed claim packet. Your claim packet consists of four forms. All questions on these forms are important. Please answer them to the best of your ability. If a section does not apply to you, or the information is unavailable, please indicate that in the space provided.

The four forms in your claim packet are:

# 1. Employee's Claim/Payment Consent

You must fill out this Claim completely. If not enough space is given on the form, please use an additional sheet. Remember to sign and date the Claim. An unsigned Claim will be returned for your signature.

# 2. Authorization to Obtain and Release Information

Please sign and date this form and attach it to the Employee's Claim. Your signature on this form enables Standard Insurance Company to obtain the information necessary to determine your eligibility for this benefit. The Authorization also allows us to release this information to other parties for purposes specified on the Authorization. You will receive a copy of this Authorization upon your request.

# 3. Attending Physician's Statement

- Part A should be completed by you.
- Part B should be completed by your physician. If you have seen more than one physician for your disability, a statement should be completed by each physician. Your physician(s) should mail the completed form directly to The Standard.

# 4. Employer's Statement

This form should be completed entirely by your Employer. Please see that your Employer returns the form to The Standard.

You are responsible for making sure all required forms are completed and returned to our office. Processing of your claim will begin when all completed forms are received. Should you have any questions, our office is available to assist you.

Please make sure that you have answered all questions completely and accurately. If there are unanswered questions, the review of your claim may be delayed. An Employer's Statement and Attending Physician's Statement must also be submitted to The Standard.

# Please print clearly.

Full Name			
Street Address			
City		State ZIP	
Phone ()	Birthda	ate Social Security No	
Marital Status 🗌 Single 🗌 Married 🔲	Widowed 🗌 Divorce	d	
Have you received a Certificate of Insurance	, brochure or other wr	itten description of the Accelerated Benefit? $\Box$ Yes $\Box$ No	
Name of Employer _ City of Los Angeles			
Street Address			
		State ZIP	
Date Hired			
Have you stopped working?   Yes  No.	b If yes, last da	y at work	
Are you self-employed at any activity?	Yes No	Are you covered under more than one group life insurance policy issued by Standard Insurance Company?	□Yes □No
Are you now working at your occupation or another occupation?	🗆 Yes 🔲 No	Have you applied for waiver of premium?	🗆 Yes 🔲 No
Describe your present medical condition.			

#### Please provide the following information regarding any physicians who have treated you. Attach a separate sheet for additional physicians.

Physician's Name	Specialty	
Street Address		
City	State ZIP	
Phone () Date first consulted		
Please indicate if you are currently confined to a hospital $\Box$ Yes $\Box$ No	Nursing Home 🛛 Yes 🗌 No	
If you answered yes, please provide the date confinement began Is confinement permanent? 🗌 Yes		
Please provide the name and address of hospital or nursing home.		
Name		
Street	City State ZIP	

# Standard Insurance Company

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Claimant's Name			
Are you currently receiving in-home care?  Yes Please describe type of care and by whom provided.	☐ No If yes, care is □	] Full-time 🗌 Part-time	
What amount of accelerated benefit are you claiming?	2% 10% minimum* 25% minimum* 50% maximum* 75% maximum*	\$ \$5,000 minimum* \$250,000 maximum* \$500,000 maximum*	
* Subject to the terms in your policy, the minimums and of Insurance.	maximums indicated here mo	ay vary. Please read the Accelerated Benefit provision	in your Certificate
Is part or all of your Life Insurance required to be paid	to your children, spouse or	r formor spouso as a part of	

a court-approved divorce decree, separate maintenance agreement or property settlement agreement?
Are you married and living in a community-property state (Arizona, California, Idaho, Louisiana, Nevada, New Mexico, Texas, Washington or Wisconsin)?
If yes, your spouse must complete the attached written consent for payment of an Accelerated Benefit.
Have you made an assignment of all or part of your insurance?
Have you filed for bankruptcy?
Are you required by a government agency to use the Accelerated Benefit to apply for, receive, or continue a government benefit or entitlement?
(If you are covered under a policy issued in CT, you are not required to respond.)
Have you previously applied for or received an Accelerated Benefit under the Group Policy?
Have you made application to convert or have you converted all or part of your coverage under the Group Policy to an individual policy?

I certify the above answers are true and complete and to the best of my knowledge and belief form the basis of my claim for an Accelerated Benefit. I do understand that the receipt of an Accelerated Benefit may be taxable and affect my eligibility for Medicaid or other government benefits or entitlements. I also understand that if I meet the definition of "terminally ill individual" of the Internal Revenue Code Section 101, my Accelerated Benefit may be non-taxable and these matters should be discussed with my tax and/or legal advisor before applying for an Accelerated Benefit. I further understand that this benefit provides for an accelerated payment of life insurance and is not intended nor designed to provide health, nursing home or long term care benefits.

### Acknowledgement

I hereby certify that the answers I have made to the foregoing questions are both complete and true to the best of my knowledge and belief. I acknowledge that I have read the fraud notice on page 4 of this form.

Signature

Date

Some states require us to provide the following information to you:

## ALABAMA, MARYLAND AND RHODE ISLAND RESIDENTS

Any person who knowingly or willfully presents a false or fraudulent claim for payment of a loss or benefit or who knowingly or willfully presents false information in an application for insurance is guilty of a crime and may be subject to fines and confinement in prison.

## CALIFORNIA RESIDENTS

For your protection, California law requires the following to appear on this form: Any person who knowingly presents a false or fraudulent claim for the payment of a loss is guilty of a crime and may be subject to fines and confinement in state prison.

## **COLORADO RESIDENTS**

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## DISTRICT OF COLUMBIA RESIDENTS

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### FLORIDA RESIDENTS

Any person who knowingly and with intent to injure, defraud or deceive an insurance company, files a statement of claim or an application containing false, incomplete or misleading information is guilty of a felony of the third degree

#### **NEW JERSEY RESIDENTS**

Any person who knowingly files a statement of claim containing any false or misleading information is subject to criminal and civil penalties.

#### NEW YORK RESIDENTS

Any person who knowingly and with intent to defraud any insurance company or other person files an application for insurance or statement of claim, containing any materially false information, or conceals for the purpose of misleading, information concerning any fact material thereto, commits a fraudulent insurance act, which is a crime, and shall also be subject to civil penalty not to exceed five thousand dollars and the stated value of the claim for each such violation.

#### PENNSYLVANIA RESIDENTS

Any person who knowingly and with intent to defraud any insurance company or other person files an application for insurance or statement of claim containing any materially false information or conceals for the purpose of misleading, information concerning any fact material thereto commits a fraudulent insurance act, which is a crime and subjects such person to criminal and civil penalties.

# ALL OTHER RESIDENTS

Some states require us to inform you that any person who knowingly and with intent to injure, defraud or deceive an insurance company, or other person, files a statement containing false or misleading information concerning any fact material hereto commits a fraudulent insurance act which is subject to civil and/or criminal penalties, depending upon the state. Such actions may be deemed a felony and substantial fines may be imposed.

STATE OF	)
	) ss.
County of	)

The undersigned, on oath being first duly sworn, depose and say:

My relationship to \_\_\_\_\_

(Name of Claimant)

□ Spouse living in a community property state

□ Assignee under an assignment

□ Trustee in bankruptcy or other official of the Bankruptcy Court

I understand that the claimant is making application to Standard Insurance Company (The Standard) for the payment of an Accelerated Benefit in the amount of \$\_\_\_\_\_\_ under a group term life insurance policy. I consent to the payment by The Standard to claimant of the Accelerated Benefit should The Standard determine the claimant to be eligible.

 Subscribed and sworn to before me this \_\_\_\_\_\_ day of \_\_\_\_\_\_

Notary Public for the
State of

\_ is:

My commission expires \_\_\_\_\_

I AUTHORIZE THESE PERSONS having any records or knowledge of me or my health:

- Any physician, medical practitioner or health care provider.
- Any hospital, clinic, pharmacy or other medical or medically related facility or association.
- Kaiser Permanente.
- Any insurance company or annuity company.
- Any employer, policyholder or plan sponsor.
- Any organization or entity administering a benefit or leave program (including statutory benefits) or an annuity program.
- Any educational, vocational or rehabilitation counselor, organization or program.
- Any consumer reporting agency, financial institution, accountant, or tax preparer.
- Any government agency (for example, Social Security Administration, Public Retirement System, Railroad Retirement Board, Workers' Compensation Board, etc.).

#### **TO GIVE THIS INFORMATION:**

- Charts, notes, x-rays, operative reports, lab and medication records and all other medical information about me, including medical history, diagnosis, testing and test results. Prognosis and treatment of any physical or mental condition, including:
  - Any disorder of the immune system, including HIV, Acquired Immune Deficiency Syndrome (AIDS) or other related syndromes or complexes.
  - Any communicable disease or disorder.
  - Any psychiatric or psychological condition, including test results, but excluding psychotherapy notes. Psychotherapy notes ٠ do not include a summary of diagnosis, functional status, the treatment plan, symptoms, prognosis and progress to date.
  - Any condition, treatment, or therapy related to substance abuse, including alcohol and drugs.

and:

Any non-medical information requested about me, including such things as education, employment history, earnings or finances, return to work accommodation discussions or evaluations and eligibility for other benefits or leave periods including but not limited to claims status, benefit amount, payments, settlement terms, effective and termination dates, plan or program contributions, etc.

#### TO STANDARD INSURANCE COMPANY, THE STANDARD LIFE INSURANCE COMPANY OF NEW YORK, THE STANDARD BENEFIT ADMINISTRATORS AND THEIR AUTHORIZED REPRESENTATIVES (referred to as "The Companies", individually and collectively), AND MY EMPLOYER'S ABSENCE MANAGEMENT PROGRAM ADMINISTRATOR ("Absence Manager").

- I acknowledge that any agreements I have made to restrict my protected health information do not apply to this authorization and I instruct the persons and organizations identified above to release and disclose my entire medical record without restriction.
- I understand that each of The Companies and Absence Manager will gather my information only if they are administering or deciding my disability or leave of absence claim(s), and will use the information to determine my eligibility or entitlement for benefits or leave of absence.
- I understand that I have the right to refuse to sign this authorization and a right to revoke this authorization at any time by sending a written statement to The Companies and Absence Manager, except to the extent the authorization has been relied upon to disclose requested records. A revocation of the authorization, or the failure to sign the authorization, may impair The Companies and Absence Manager's ability to evaluate or process my claim(s), and may be a basis for denying or closing my claim(s) for benefits or leave of absence.
- I understand that in the course of conducting its business The Companies and Absence Manager may disclose to other parties information about me. They may release information to a reinsurer, a plan administrator, plan sponsor, or any person performing business or legal services for them in connection with my claim(s). I understand that The Companies and Absence Manager will release information to my employer necessary for absence management, for return to work and accommodation discussions, and when performing administration of my employer's self-funded (and not insured) disability plans.
- I understand that The Companies and Absence Manager comply with state and federal laws and regulations enacted to protect my privacy. I also understand that the information disclosed to them pursuant to this authorization may be subject to redisclosure with my authorization or as otherwise permitted or required by law. Information retained and disclosed by The Companies and Absence Manager may not be protected under the Health Insurance Portability and Accountability Act [HIPAA].
  - I understand and agree that this authorization as used to gather information shall remain in force from the date signed below:
  - For Standard Insurance Company, the duration of my claim(s) or 24 months, whichever occurs first.
  - For The Standard Life Insurance Company of New York, the duration of my claim(s) or 24 months, whichever occurs first. •
  - For The Standard Benefit Administrators, the duration of my claim(s) administered by The Standard Benefit Administrators or 24 months, whichever occurs first.
  - For Absence Manager, 24 months.
- I understand and agree that The Companies and Absence Manager may share information with each other regarding my disability and leave of absence claim(s). This authorization to share information shall remain valid for 12 months from the date signed below.
- I acknowledge that I have read this authorization and the New Mexico notice on page 7. A photocopy or facsimile of this authorization is as valid as the original and will be provided to me upon request.

Name (please print) \_\_\_\_\_ Social Security No. \_\_\_\_\_

Signature of Claimant/Representative

If signature is provided by legal representative (e.g., Attorney in Fact, guardian or conservator), please attach documentation of legal status.

\_\_\_\_\_ Date\_\_\_\_

Standard Insurance Company is a licensed insurance company in all states except New York. The Standard Life Insurance Company of New York is an insurance company licensed only in New York. An absence manager may be hired by your employer and may be one of The Companies.

# FOR RESIDENTS OF NEW MEXICO

The state of New Mexico requires Standard Insurance Company to provide you with the following information pursuant to its Domestic Abuse Insurance Protection Act.

The Authorization form allows Standard Insurance Company to obtain personal information as it determines your eligibility for insurance benefits. The information obtained from you and from other sources may include confidential abuse information. "Confidential abuse information" means information about acts of domestic abuse or abuse status, the work or home address or telephone number of a victim of domestic abuse or the status of an applicant or insured as a family member, employer or associate of a victim of domestic abuse or a person with whom an applicant or insured is known to have a direct, close personal, family or abuse-related counseling relationship. With respect to confidential abuse information, you may revoke this authorization in writing, effective ten days after receipt by Standard Insurance Company, understanding that doing so may result in a claim being denied or may adversely affect a pending insurance action.

Standard Insurance Company is prohibited by law from using abuse status as a basis for denying, refusing to issue, renew or reissue or canceling or otherwise terminating a policy, restricting or excluding coverage or benefits of a policy or charging a higher premium for a policy.

Upon written request you have the right to review your confidential abuse information obtained by Standard Insurance Company. Within 30 business days of receiving the request, Standard Insurance Company will mail you a copy of the information pertaining to you. After you have reviewed the information, you may request that we correct, amend or delete any confidential abuse information which you believe is incorrect. Standard Insurance Company will carefully review your request and make changes when justified. If you would like more information about this right or our information practices, a full notice can be obtained by writing to us.

If you wish to be a protected person (a victim of domestic abuse who has notified Standard Insurance Company that you are or have been a victim of domestic abuse) and participate in Standard Insurance Company's location information confidentiality program, your request should be sent to Standard Insurance Company. The patient is responsible for the completion of this form at their own expense. We require comprehensive medical information in order to evaluate the insured's claim for Accelerated Benefit. Please print clearly.

# Part A. To Be Completed By Patient

		_ Phone ()
City		_ State ZIP
Birthdate	Social Security No	Sex: 🗆 Male 🗆 Female
Policy Number 630363		

# Part B. To Be Completed By Physician

The purpose of this form is to help us determine whether your patient is eligible for accelerated payment of life insurance proceeds. We need to evaluate the clinical condition of your patient. Please advise of any clinical findings including laboratory data and results of special tests such as X-rays, CAT scan, EKG, etc. Copies of any surgical reports, hospital discharge summaries, chart notes, or narrative reports will be helpful.

Weight	Height	Blood pressure on last visit		Pulse
Diagnosis				
Course of treatm	ent, including medic	ations		
Prognosis				
In your opinion, o	loes the patient have	e a terminal condition?		
What is the term	inal condition?			
In your professio	nal opinion, what is t	he patient's life expectancy?	Less than 6 months	
			$\Box$ 6 to 12 months	
			Greater than 12 months	5
			Other	
Objective Finding	gs – Objective docun	nentation must be included to s	support life expectancy	
Symptoms				
When did symptoms first appear?				
Date you recomr	nended patient shou	ld stop working	Why?	

# Standard Insurance Company

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Claimant's Name\_\_\_\_

Dates and Nature of Treatment					
(a) Date of first visit Date of last visit					
(b) Frequency 🗌 Weekly 🗌 Monthly 🗌 Other Specify					
(c) Will treatment substantially improve function and employability?  Yes  No If yes, specify					
(d) Have you made referrals?  Yes No If yes, specify					
NameSpecialty	Phone ()				
Progress					
(a) Has patient: Retrogressed Unchanged Improved Recovered					
(b) Is patient: Hospital confined Bed confined House confined Ambulatory	/				
(c) If patient has been hospitalized, please provide the name, address, and phone number of the hospital.					
Admitted Discharged Phone ()					
Limitation					
Are the limitations permanent?  Yes No					
Sitting Climbing Bending Use of left hand/arm Use of right hand/arm	□ Walking				
Stooping Lifting Pushing/Pulling Other clarify					
Physical Impairment *as defined in Federal Dictionary of Occupational Titles					
Class 1 – No limitation of functional capacity; capable of heavy work*; No restrictions					
□ Class 2 – Medium manual activity*					
□ Class 3 – Slight limitation of functional capacity; capable of light work*					
Class 4 – Moderate limitation of functional capacity; capable of clerical/administrative (sedentary*) activity					
□ Class 5 – Severe limitation of functional capacity; incapable of minimal (sedentary*) activity					
Do you believe the patient is competent to manage insurance benefits?  Yes  No					
If no, is the patient competent to appoint someone to help manage the insurance benefits? $\Box$ Yes $\Box$ No					
List Other Treating or Referring Physicians					
NAME ADDRESS					
1					
Address and City	State	ZIP			
Z Address and City	State	ZIP			

#### Acknowledgement

I hereby certify that the answers I have made to the foregoing questions are both complete and true to the best of my knowledge and belief. I acknowledge that I have read the fraud notice on page 10 of this form.

Signature \_

\_ Date \_\_\_

Some states require us to provide the following information to you:

## ALABAMA, MARYLAND AND RHODE ISLAND RESIDENTS

Any person who knowingly or willfully presents a false or fraudulent claim for payment of a loss or benefit or who knowingly or willfully presents false information in an application for insurance is guilty of a crime and may be subject to fines and confinement in prison.

## CALIFORNIA RESIDENTS

For your protection, California law requires the following to appear on this form: Any person who knowingly presents a false or fraudulent claim for the payment of a loss is guilty of a crime and may be subject to fines and confinement in state prison.

## **COLORADO RESIDENTS**

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## DISTRICT OF COLUMBIA RESIDENTS

WARNING: It is a crime to provide false or misleading information to an insurer for the purpose of defrauding the insurer or any other person. Penalties include imprisonment and/or fines. In addition, an insurer may deny insurance benefits, if false information materially related to a claim was provided by the applicant.

### FLORIDA RESIDENTS

Any person who knowingly and with intent to injure, defraud or deceive an insurance company, files a statement of claim or an application containing false, incomplete or misleading information is guilty of a felony of the third degree

#### **NEW JERSEY RESIDENTS**

Any person who knowingly files a statement of claim containing any false or misleading information is subject to criminal and civil penalties.

#### NEW YORK RESIDENTS

Any person who knowingly and with intent to defraud any insurance company or other person files an application for insurance or statement of claim, containing any materially false information, or conceals for the purpose of misleading, information concerning any fact material thereto, commits a fraudulent insurance act, which is a crime, and shall also be subject to civil penalty not to exceed five thousand dollars and the stated value of the claim for each such violation.

#### PENNSYLVANIA RESIDENTS

Any person who knowingly and with intent to defraud any insurance company or other person files an application for insurance or statement of claim containing any materially false information or conceals for the purpose of misleading, information concerning any fact material thereto commits a fraudulent insurance act, which is a crime and subjects such person to criminal and civil penalties.

# ALL OTHER RESIDENTS

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# Please print clearly and complete all questions. Form may be returned for completion of unanswered questions.

# 1. Employee

Name of Employee			
Street Address			
City		State	_ ZIP
Job Title			
Social Security No	Date of Birth		

# 2. Work Status Information

Date of employment or association membership (union or other)	Union Member 🗌 Yes 🗌 No
Effective date of Employee's insurance	
Name of Union Contac	t Person
Employee's status on date disability commenced:	
Was Employee Actively at Work the day before disability commenced? $\$ D Yes $\$	□ No
Number of hours worked per week Last day of work before d	lisability commenced
Is Employee terminated?  Yes Effective Date No If yes, please stop premium payment for this Employee.	
Reason for termination	

# 3. Other Information

Does Employee have any of the following insurance coverage with a carrier other than The Standard? Has Employee applied for:			
	Other Carrier	Applied	Receiving
A. Long Term Disability	🗆 Yes 🛛 No	🗆 Yes 🛛 No	□ Yes □ No
B. Short Term Disability	🗆 Yes 🛛 No	🗆 Yes 🛛 No	□ Yes □ No
C. Life Insurance under more than one policy	🗆 Yes 🔲 No	🗆 Yes 🔲 No	🗆 Yes 🔲 No
Please provide the name, address and contact pers	on for the above.		
A. Name		B. Name	
Address		Address	
City State	ZIP	City	State ZIP
Phone ()		Phone ()	)
Fax ()		Fax ()	)
Social Security Benefits Has Employee applied for benefits? Security Benefits? Security Benefits? Security Benefits?			

# Standard Insurance Company

Life Benefits Department PO Box 2800 Portland OR 97208-2800 800.628.8600 Tel

#### Claimant's Name\_

<b>4.</b> ]	Earnings		
ŀ	Please check appropriate box and fill in t	he amount of salary.	
	Basic Monthly Earnings	Monthly Rate \$	
	Basic Yearly Earnings	Annual Rate \$	
	Basic Contract Earnings	Contract Amount \$	Length of Contract
	Basic Weekly Earnings	Weekly Rate \$	
	Basic Hourly Earnings	Hourly Rate \$	
	Commissions. Please attach list	of commissions paid for the peri	od specified in your group policy.
	Date of last increase		Earnings prior to increaseper
	If effective date of increase in insurance	is different than date of last ea	nings increase,
	please give effective date of insurance ir	crease	
5	Amount of Insurance		
<b>J.</b> 1	Amount of msurance		
[	Does Employee have group Life Insurance	e with Standard Insurance Cor	npany under more than one policy? $\Box$ Yes $\Box$ No
1	f yes, list all of The Standard's policy nur	nbers	
1	Does Employee have Long Term Disabili	ty with The Standard? $\Box$ Yes	□ No Job Classification
	Amount of Basic Life Insurance with T	he Standard \$	
	Amount of Optional Life Insurance wit	h The Standard \$	
	Amount of Voluntary Life Insurance w	th The Standard \$	
	Amount of Additional Life Insurance w	vith The Standard \$	
1	Policy Class Number		
[	Does Employee have Life Insurance for c	lependents under your group p	olicy? 🗌 Yes 🔲 No
I	f yes, amount of Spouse Life Insurance	\$	Dependents Life Insurance \$
i	Please continue payment of premiums unti	otherwise notified unless employ	vee has been terminated.
1	f premiums have already been terminate	d, give date paid through	
6. 4	Attachments		
	Please attach the following:		Important
	a. Original Enrollment card and any su	bsequent beneficiary changes	Information
	<ul> <li>Copy of Job Description</li> <li>Copy of Employment Application or Employment Application</li> </ul>	Resume	Please Attach

c. Copy of Employment Application or Resume

# 7. Employer Representative Completing This Form *Please print or type*.

Employer	City of Los Angeles		Representative	
Address _				ZIP
Phone (	)	Fax ()		Policy Number 630363

Acknowledgement

I hereby certify that the answers I have made to the foregoing questions are both complete and true to the best of my knowledge and belief. I acknowledge that I have read the fraud notice on page 13 of this form.

Signature \_\_\_\_

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