

Universal Education Protector: Claim form

Employer / Fund Name

Scheme Code

Important Information

- All references to insured will mean either employee or fund member.
- The form is to be used to inform Sanlam of the education expenses the deceased insured was responsible for at the date of death, and would have become responsible for in the future, for all their eligible children.
- A separate Universal Education Protector claim form must be completed for each eligible child, together with Annexure A or B.
- Please e-mail the completed claim form and supporting documentation to: UEPtuitionfees@sanlam.co.za
- For the latest information view our [Guardian brochure](#) or contact the Client Contact Centre on 0860 007 775

SECTION A: Personal details of the insured (to be completed by the employer)

Full name(s)			
Surname			
RSA identity number*			*Compulsory
If not RSA, passport number*			*Compulsory
Passport expiry date			(dd/mm/yyyy)
Date of birth			(dd/mm/yyyy)
Employee number			
Date of death			(dd/mm/yyyy)

SECTION B: Declaration by the employer or fund

I/we, the undersigned, hereby declare that the deceased qualified for benefits in terms of the policy at the date of death and that the above information is complete and correct.

Full name and surname			
Postal address			Postal code
Contact number(s)	Cell phone	Alternative	
E-mail address			
Signature 1		Signature 2	
Designation		Designation	
Date (dd/mm/yyyy)		Place	



Sanlam Corporate: Group Risk

Please return the completed form and supporting documents to:
UEPtuitionfees@sanlam.co.za.

Client Contact Centre: 0860 007 775

Supporting documentation required	
Documents required from the employer (at date of death)	Documents required for each subsequent year of education
<p>On the death of an employee / member, the following forms (via the employer) must be completed for the submission of a claim for a benefit:</p> <p>Universal Education Protector Claim form - Please complete and sign a separate form for each eligible child to register all eligible children, even if they are not of school going age (for children who are not yet of school going age, a record is created to ensure benefits can be claimed in future);</p> <p>From the surviving parent / guardian:</p> <p>A certified copy of the birth certificate of each eligible child;</p> <p>A certified copy of the surviving parent/guardian's ID or passport document;</p> <p>An affidavit from the person in whose care the child is, confirming that they're the primary care-giver; and the child's exact relationship (e.g. biological, step-or adopted child) to the deceased employee. Please include all persons' full names and ID numbers and state each child's relationship to the deceased.</p> <p>Proof of banking details for the surviving parent/guardian's account for the payment of the minimum allowance benefit (if applicable);</p> <p><i>In addition</i>, in case of the following:</p> <ul style="list-style-type: none"> If an eligible child has a different surname to the deceased, please supply a certified copy of the birth certificate indicating the name of the parents, or If an eligible child is adopted, please supply a certified copy of the adoption certificate. <p>From the Educational institution:</p> <p>Proof of registration at the educational institution where an eligible child has been registered;</p> <p>Proof that the educational institute is registered with the Department of Education;</p> <p>A certified copy of a school report or exam results of each eligible child that has been registered at an educational institution – <i>the report must be stamped by the educational institution</i>;</p> <p>An original/certified invoice, that includes the amounts due, and any amounts already paid, as well as a payment instruction, from:</p> <ul style="list-style-type: none"> the <i>educational institution</i> where an eligible child has been registered (Annexure A) – <i>the invoice must be stamped by the educational institution</i>; or the <i>university</i> where an eligible child has been registered (Annexure B), and making use of university residence (or residence fees for a university of technology (Technikon); and the <i>bookseller</i> where the educational books have been purchased, with a breakdown of the books – <i>the invoice must be stamped by the bookseller</i>. 	<p>It is the responsibility of the parent / guardian to claim a benefit for each year of education. Every year the following must be submitted to continue the payment of school fees:</p> <p>Confirmation of the deceased employee's ID number. Please send a copy of their ID document as proof.</p> <p>Information required from the educational institution in order to claim for the next year's education (that is, if the child is attending the same educational institution as at date of death):</p> <p>A certified copy of the previous year's final school report or exam results of each eligible child – <i>the report must be stamped by the educational institution</i>;</p> <p>An original/certified invoice, confirming the current balance (i.e. amounts due and amounts outstanding for the new year, as well as a payment instruction, from:</p> <ul style="list-style-type: none"> the <i>educational institution</i> where an eligible child has been registered (Annexure A) – <i>the invoice must be stamped by the educational institution</i>; or the <i>university</i> where an eligible child has been registered (Annexure B), and making use of university residence (or residence fees for a university of technology (Technikon); and the <i>bookseller</i> where the educational books have been purchased, with a breakdown of the books – <i>the invoice must be stamped by the bookseller</i>. <p>Proof that the child has been/is enrolled at the relevant education institution; if attending a no-fee school and wanting to claim the minimum allowance benefit.</p> <p>Proof of banking details for the surviving parent/guardian's account - required from the guardian in order to claim for the minimum allowance benefit (if applicable; and only grade 1-12)</p> <p>Additional information required from the educational institution when the child has changed educational institution from the previous year, or is transferring from Primary School to High School:</p> <p>Completed and signed Universal Education Protector Claim form;</p> <p>Proof of registration at the educational institution where an eligible child has been registered; and</p> <p>Proof that the relevant educational institution is registered with the Department of Education.</p> <p>Proof of the transfer between educational institutions</p> <p>Additional information required from a tertiary institution should the child be accepted to the tertiary institution (i.e. leaving high school):</p> <p>Completed and signed Universal Education Protector Claim form;</p> <p>Proof of registration at the tertiary institution where an eligible child has been registered;</p> <p>Proof of acceptance at the tertiary institution where an eligible child has been registered; and</p> <p>Proof that the relevant tertiary institution is registered with the Department of Education.</p>
<p>Important Notes: Please attach the proof of banking details to verify the bank account details of the educational institution / university residence, including when changing from one educational institution to another educational institution.</p>	

Disclaimer: Party Due Diligence requirements

In line with the FIC Amendment Act, 2017 and other Party Due Diligence requirements, Sanlam has the obligation to identify and verify all persons or entities we interact with. Thus, please provide the information as requested in the forms.

Sanlam reserves the right to cancel the insurance immediately if any of the obligations in terms of the FIC Amendment Act, 2017 and other Party Due Diligence requirements are not met.

Protection of Personal Information Disclosure

Why Personal Information is required: Sanlam Life Insurance Limited ("Sanlam Life"), a subsidiary of Sanlam Limited, will process and protect your personal information as required by relevant laws and the Constitution of the Republic of South Africa ("RSA"). The personal information requested in this form, which may include special personal information is being collected and will be processed for the following purposes:

- underwriting and providing accurate and effective insurance cover and related value-added services;
- member communication;
- market research and statistical analysis;
- verification of the personal information provided;
- to comply with all legal and regulatory requirements, including applicable codes of conduct;
- for operational and administrative processes;
- to protect Sanlam Life's interests; and
- any purposes related to the above.

Failure to provide the mandatory information will prejudice your insurance cover.

Changing and correcting Personal Information: You have the right to:

- Request a copy of your personal information as processed by Sanlam Life;
- Ask for an update and/or correction of your personal information;
- Lodge a complaint with the Information Regulator.

Sanlam Life may charge an administrative fee subject to prior notice of any such cost before executing the request for a copy of your personal information.

Other parties that may receive the Personal Information:

- We may share your personal information within Sanlam Limited and/or with other service providers where required for any of the purposes listed above, or with third parties where Sanlam Life is lawfully required to do so.
- We may send your personal information to service providers outside the RSA for storage or further processing on Sanlam Life's behalf. We will not send your information to a country that does not have information protection legislation similar to that of the RSA, unless we have a binding agreement with the service provider which ensures that it effectively adheres to the principles for processing of personal information in accordance with the Protection of Personal Information Act, 2013.

For more information, please refer to the [Sanlam Group Privacy Notice](#).

ANNEXURE A – Information required from the school (Grades 0 / R to 12)**SECTION A: Details of deceased insured's eligible child****Please note:**

- Complete a separate Universal Education Protector claim form for each eligible child.
- This section must be completed by the educational institution (Grade 0/R - 12).
- The benefits paid are subject to the latest maximums applicable at that time.

First name(s)				
Surname				
Date of birth				(dd/mm/yyyy)
What grade / academic year is the learner / student in?				
Did the learner / student pass the previous grade / academic year?	Yes		No	
Student number (if applicable)				

SECTION B: Personal details of the guardian / caregiver

In whose care is the child?	Guardian		Caregiver	
If caregiver, confirm relation	(I.e., grandmother, sister, aunt, etc.)			
First name(s)				
Surname				
Maiden name (if applicable)				
RSA identity number*				*Compulsory
If not RSA, passport number*		Country of issue*		*Compulsory
Passport expiry date				(dd/mm/yyyy)
Nationality	RSA		Other (please state country)	
Date of birth (dd/mm/yyyy)			Country of birth	
Country of residence				
Residential address				Postal code
Postal address				Postal code
Contact number(s)	Cell phone		Alternative	
E-mail address				

SECTION C: Details of the School

Name of school				
Type of school (select one)	Pre-primary school		Primary school	High school
Postal address				Postal code
Contact person (name and surname)				
Contact number				
E-mail address				

Details of the account – School-attending learner

Please Note: Cost for extra-mural activities or school boarding fees are not covered under this benefit. The reference to the 'account' is related to the school fees schedule or school fees invoice.

Breakdown of monthly school fees (excluding extra-mural activities):

Month	Amount (Rands)
January	
February	
March	
April	
May	
June	
July	
August	
September	
October	
November	
December	

Breakdown of annual school fees (including book fees):

Total annual amount	R	
Discount on school fees	R	
Book fees	R	<i>A separate invoice must be submitted for prescribed textbooks only.</i>
Amount paid	R	<i>Include all amounts paid for the current academic year by the parent / guardian, prior to the date of death)</i>
Total amount outstanding	R	

Please remember: An original / certified invoice, confirming the current balance (i.e. amounts due and amounts outstanding for new year / balance of the year, as well as a payment instruction to Sanlam.

The book allowance expenses claimed is reduced by the minimum allowance benefit paid. Only prescribed textbooks are covered and Sanlam will require a breakdown of the books prescribed per annum.

SECTION D: Declaration

This section must be completed and signed by the school

I declare that the information above is, to the best of my knowledge, complete and correct, and I have withheld no information, relevant to this claim, from Sanlam.

First name(s)		
Surname		
E-mail address		
Signature		Official stamp of the educational institution
Designation		
Place		
Date (dd/mm/yyyy)		

ANNEXURE B – Information required from the Tertiary Educational Institution

SECTION A: Details of deceased insured's eligible child

Please note:

- Complete a separate Universal Education Protector claim form for each eligible child.
- This section must be completed by the tertiary educational institution.
- The benefits paid are subject to the latest maximums applicable at that time.

First name(s)			
Surname			
Date of birth			(dd/mm/yyyy)
What academic year is the learner / student in?			
Did the learner / student pass the previous academic year?	Yes	<input type="checkbox"/>	No <input type="checkbox"/>
Student number (if applicable)			

SECTION B: Details of tertiary institution

Name of the institution			
Type of institution (select one)	College <input type="checkbox"/>	University <input type="checkbox"/>	University of Technology (Technikon) <input type="checkbox"/>
Postal address			Postal code
Contact person (name and surname)			
Contact number			
E-mail address			

Details of the account – Student

Please Note: Costs for extra mural activities are not covered under this benefit.

The benefit payment is only for academic purposes, which include textbooks and study modules only.

Please provide a breakdown of tuition fees in the table below.

Subject / Module	Amount (R)	Subject / Module	Amount (R)

Breakdown of annual statement (including book fees):

Please Note: The amount(s) below **should not include** residence or accommodation fees

Total annual amount of tuition fees	R	
Book fees	R	A separate invoice must be submitted for prescribed textbooks only.
Amount paid	R	(Include all amounts paid for the current academic year by the parent / guardian, prior to the date of death)
Total amount outstanding	R	

Please remember: An original/certified invoice, confirming the current balance (i.e. amounts due and amounts outstanding for new year / balance of the year, as well as a payment instruction to Sanlam.)

University Residence Fees

Please Note: This allowance is only payable for children boarding at official university or technikon residences and does not include other boarding houses, schools, colleges and private accommodation, or boarding for NQF recognized tertiary level diplomas/certificates

Total residence fees:	
-----------------------	--

SECTION C: Declaration

This section must be completed and signed by the tertiary institution

I declare that the information above is, to the best of my knowledge, complete and correct, and I have withheld no information, relevant to this claim, from Sanlam.

First name(s)		
Surname		
E-mail address		
Signature		Official stamp of the educational institution
Designation		
Place		
Date (dd/mm/yyyy)		