



Maturity Checklist

Please use this checklist of requirements to assist Windsor Life in processing your maturing policy.

To avoid unnecessary delays please make sure that you enclose:

- Your original policy document
- Completed Maturity Form of Discharge
- Completed Customer Identification Form (to satisfy Money Laundering identification requirements)

And note the following:

- Use of correction fluid will invalidate forms
- For security reasons we would be grateful if you would send us original documents where requested, which will be returned to you on the day of receipt by recorded delivery. We do not accept certified copies because of the potential there is for photocopy documents to assist in the perpetration of fraud. Even authorised photocopies do little to prevent forgery, as inherent security features such as watermarks are still absent.
- In order to protect our clients, funds will only be paid to one of the following:
 - Policyholder,
 - Owner,
 - Trustee or Assignee,
 - Another approved financial services company,
 - A Solicitor or Executor (for claim payments), and
 - A spouse or named beneficiary (for death claims only).