



SHORT TERM DISABILITY PLAN MEMBER STATEMENT

Please return this completed form and supporting documents to:

Wawanesa Life - Claims
400-200 Main Street, Winnipeg, MB R3C 1A8
For inquiries, please call: 1-844-318-0411, #4
Email: WawanesaLife-claims@wawanesa.com
Website: wawanesalife.com

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| <p>PLAN MEMBER INFORMATION</p> | <p>Plan Sponsor _____ Group Plan # _____</p> <p>Plan Member _____ <input type="checkbox"/> Male <input type="checkbox"/> Female <small>Last Name First Name Initial</small></p> <p>Date of Birth _____ Weight _____ Height _____ <small>(yy/mm/dd)</small></p> <p>Address _____ <small>Street City Province Postal Code</small></p> <p>Phone Number _____ Email _____</p> <p><i>I authorize the use of my Social Insurance Number for tax reporting purposes when required in payment of my Group Long Term Disability benefit.</i></p> <p>Social Insurance Number _____ Signature _____</p> | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| <p>FAMILY INFORMATION</p> | <p>Spouse's name _____ Date of Birth _____ <small>Last Name First Name (yy/mm/dd)</small></p> <p>Is your spouse employed? <input type="checkbox"/> Yes <input type="checkbox"/> No</p> <table border="0"> <tr> <td>Dependent Children:</td> <td>Date of Birth:</td> <td>At Home</td> <td>In School</td> </tr> <tr> <td>_____</td> <td>_____</td> <td><input type="checkbox"/> Yes <input type="checkbox"/> No</td> <td><input type="checkbox"/> Yes <input type="checkbox"/> No</td> </tr> <tr> <td><small>Last Name First Name (yy/mm/dd)</small></td> <td></td> <td></td> <td></td> </tr> <tr> <td>_____</td> <td>_____</td> <td><input type="checkbox"/> Yes <input type="checkbox"/> No</td> <td><input type="checkbox"/> Yes <input type="checkbox"/> No</td> </tr> <tr> <td><small>Last Name First Name (yy/mm/dd)</small></td> <td></td> <td></td> <td></td> </tr> <tr> <td>_____</td> <td>_____</td> <td><input type="checkbox"/> Yes <input type="checkbox"/> No</td> <td><input type="checkbox"/> Yes <input type="checkbox"/> No</td> </tr> <tr> <td><small>Last Name First Name (yy/mm/dd)</small></td> <td></td> <td></td> <td></td> </tr> <tr> <td>_____</td> <td>_____</td> <td><input type="checkbox"/> Yes <input type="checkbox"/> No</td> <td><input type="checkbox"/> Yes <input type="checkbox"/> No</td> </tr> <tr> <td><small>Last Name First Name (yy/mm/dd)</small></td> <td></td> <td></td> <td></td> </tr> </table> | Dependent Children: | Date of Birth: | At Home | In School | _____ | _____ | <input type="checkbox"/> Yes <input type="checkbox"/> No | <input type="checkbox"/> Yes <input type="checkbox"/> No | <small>Last Name First Name (yy/mm/dd)</small> | | | | _____ | _____ | <input type="checkbox"/> Yes <input type="checkbox"/> No | <input type="checkbox"/> Yes <input type="checkbox"/> No | <small>Last Name First Name (yy/mm/dd)</small> | | | | _____ | _____ | <input type="checkbox"/> Yes <input type="checkbox"/> No | <input type="checkbox"/> Yes <input type="checkbox"/> No | <small>Last Name First Name (yy/mm/dd)</small> | | | | _____ | _____ | <input type="checkbox"/> Yes <input type="checkbox"/> No | <input type="checkbox"/> Yes <input type="checkbox"/> No | <small>Last Name First Name (yy/mm/dd)</small> | | | |
| Dependent Children: | Date of Birth: | At Home | In School | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| _____ | _____ | <input type="checkbox"/> Yes <input type="checkbox"/> No | <input type="checkbox"/> Yes <input type="checkbox"/> No | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| <small>Last Name First Name (yy/mm/dd)</small> | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| _____ | _____ | <input type="checkbox"/> Yes <input type="checkbox"/> No | <input type="checkbox"/> Yes <input type="checkbox"/> No | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| <small>Last Name First Name (yy/mm/dd)</small> | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| _____ | _____ | <input type="checkbox"/> Yes <input type="checkbox"/> No | <input type="checkbox"/> Yes <input type="checkbox"/> No | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
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| <small>Last Name First Name (yy/mm/dd)</small> | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| <p>DISABILITY INFORMATION</p> <p><i>Please provide a copy of the incident / police report</i></p> | <p>Please describe your current condition and how it prevents you from working.</p> <p>What were your first symptoms?</p> <p>When did you first notice symptoms? _____ <small>(yy/mm/dd)</small></p> <p>If accident, describe the injury, how it occurred and how it prevents your from working.</p> <p>Where did the accident/injury occur? _____</p> <p>Time & date of accident _____</p> <p>Was another party at fault? <input type="checkbox"/> Yes <input type="checkbox"/> No Was alcohol involved? <input type="checkbox"/> Yes <input type="checkbox"/> No</p> <p>Was it reported to the police? <input type="checkbox"/> Yes <input type="checkbox"/> No Were any charges laid? <input type="checkbox"/> Yes <input type="checkbox"/> No</p> <p>Are there any other factors that prevent you from working?</p> <p>Is your condition related to your occupation? Please explain:</p> | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |

| <p>DISABILITY INFORMATION</p> <p><i>Continued</i></p> | <p>Has a claim been filed with another wage loss provider? <input type="checkbox"/> Yes <input type="checkbox"/> No</p> <p>If 'Yes', select provider <input type="checkbox"/> WCB/WSIB/CSST <input type="checkbox"/> CPP/QPP <input type="checkbox"/> Auto <input type="checkbox"/> Other, specify _____</p> <p>Date Filed _____ (yy/mm/dd) Decision _____ Amount _____</p> | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
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| <p>TREATMENT INFORMATION</p> | <p>Date first treated _____ (yy/mm/dd)</p> <p>Were you hospitalized? <input type="checkbox"/> Yes <input type="checkbox"/> No If 'Yes', where _____</p> <p>Admission Date _____ (yy/mm/dd) Discharge Date _____ (yy/mm/dd)</p> <p>List all health care providers you have consulted during the past two years (eg. chiropractor, doctor)</p> <table border="1" style="width:100%; border-collapse: collapse; text-align: center;"> <thead> <tr style="background-color: #ffffcc;"> <th style="width:30%;">Name</th> <th style="width:20%;">First Consultation</th> <th style="width:20%;">Last Consultation</th> <th style="width:30%;">Reason</th> </tr> </thead> <tbody> <tr><td> </td><td> </td><td> </td><td> </td></tr> <tr><td> </td><td> </td><td> </td><td> </td></tr> <tr><td> </td><td> </td><td> </td><td> </td></tr> <tr><td> </td><td> </td><td> </td><td> </td></tr> <tr><td> </td><td> </td><td> </td><td> </td></tr> </tbody> </table> <p>Since your absence from work, what type of treatment have you received? (eg. Medical, physiotherapy, counselling, etc.)</p> | Name | First Consultation | Last Consultation | Reason | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Name | First Consultation | Last Consultation | Reason | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
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| <p>CURRENT EMPLOYMENT INFORMATION</p> | <p>Last day you worked before disability _____ (yy/mm/dd) Hours Worked _____</p> <p>Date you were first unable to work _____ (yy/mm/dd)</p> <p>Have you returned to work? <input type="checkbox"/> Yes <input type="checkbox"/> No If 'Yes', when _____ (yy/mm/dd)</p> <p>If you have not returned to work, when do you expect to? _____ (yy/mm/dd)</p> <p>Have you performed any other work since that date? <input type="checkbox"/> Yes <input type="checkbox"/> No If 'Yes', describe.</p> <p>Are you able to do any other work? <input type="checkbox"/> Yes <input type="checkbox"/> No If 'Yes', describe.</p> | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| <p>FINANCIAL</p> <p><i>Please provide copies of any initial benefit statements</i></p> <p><i>For the duration of your claim for benefits, it is your responsibility to notify Wawanesa Life of: any work performed, whether or not you have received a wage or remuneration and or any employment income paid to your or any other person or party as a result of work performed by you.</i></p> | <table style="width:100%; border-collapse: collapse;"> <thead> <tr> <th style="width:70%;"></th> <th style="width:10%; text-align: center;">Applied</th> <th style="width:10%; text-align: center;">Awarded</th> <th style="width:10%;"></th> </tr> <tr> <th></th> <th style="text-align: center;">Yes</th> <th style="text-align: center;">No</th> <th style="text-align: center;">Yes No Amount</th> </tr> </thead> <tbody> <tr> <td>Have you applied for or are received the following:</td> <td></td> <td></td> <td></td> </tr> <tr> <td>Canada Pension Plan / Quebec Pension Plan</td> <td style="text-align: center;"><input type="checkbox"/></td> <td style="text-align: center;"><input type="checkbox"/></td> <td style="text-align: center;"><input type="checkbox"/> <input type="checkbox"/> _____</td> </tr> <tr> <td>Worker's Compensation Board Benefits (or similar)</td> <td style="text-align: center;"><input type="checkbox"/></td> <td style="text-align: center;"><input type="checkbox"/></td> <td style="text-align: center;"><input type="checkbox"/> <input type="checkbox"/> _____</td> </tr> <tr> <td>Employment Insurance Benefits</td> <td style="text-align: center;"><input type="checkbox"/></td> <td style="text-align: center;"><input type="checkbox"/></td> <td style="text-align: center;"><input type="checkbox"/> <input type="checkbox"/> _____</td> </tr> <tr> <td>Automotive Insurance Benefits</td> <td style="text-align: center;"><input type="checkbox"/></td> <td style="text-align: center;"><input type="checkbox"/></td> <td style="text-align: center;"><input type="checkbox"/> <input type="checkbox"/> _____</td> </tr> <tr> <td>Any other Disability Benefits</td> <td style="text-align: center;"><input type="checkbox"/></td> <td style="text-align: center;"><input type="checkbox"/></td> <td style="text-align: center;"><input type="checkbox"/> <input type="checkbox"/> _____</td> </tr> <tr> <td>Employer Sponsored Retirement / Pension Plan Income</td> <td style="text-align: center;"><input type="checkbox"/></td> <td style="text-align: center;"><input type="checkbox"/></td> <td style="text-align: center;"><input type="checkbox"/> <input type="checkbox"/> _____</td> </tr> <tr> <td>Self Employment Income or other</td> <td style="text-align: center;"><input type="checkbox"/></td> <td style="text-align: center;"><input type="checkbox"/></td> <td style="text-align: center;"><input type="checkbox"/> <input type="checkbox"/> _____</td> </tr> <tr> <td>Old Age Security</td> <td style="text-align: center;"><input type="checkbox"/></td> <td style="text-align: center;"><input type="checkbox"/></td> <td style="text-align: center;"><input type="checkbox"/> <input type="checkbox"/> _____</td> </tr> <tr> <td>Other: _____</td> <td style="text-align: center;"><input type="checkbox"/></td> <td style="text-align: center;"><input type="checkbox"/></td> <td style="text-align: center;"><input type="checkbox"/> <input type="checkbox"/> _____</td> </tr> </tbody> </table> | | Applied | Awarded | | | Yes | No | Yes No Amount | Have you applied for or are received the following: | | | | Canada Pension Plan / Quebec Pension Plan | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> <input type="checkbox"/> _____ | Worker's Compensation Board Benefits (or similar) | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> <input type="checkbox"/> _____ | Employment Insurance Benefits | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> <input type="checkbox"/> _____ | Automotive Insurance Benefits | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> <input type="checkbox"/> _____ | Any other Disability Benefits | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> <input type="checkbox"/> _____ | Employer Sponsored Retirement / Pension Plan Income | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> <input type="checkbox"/> _____ | Self Employment Income or other | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> <input type="checkbox"/> _____ | Old Age Security | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> <input type="checkbox"/> _____ | Other: _____ | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> <input type="checkbox"/> _____ |
| | Applied | Awarded | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| | Yes | No | Yes No Amount | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Have you applied for or are received the following: | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Canada Pension Plan / Quebec Pension Plan | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> <input type="checkbox"/> _____ | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Worker's Compensation Board Benefits (or similar) | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> <input type="checkbox"/> _____ | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Employment Insurance Benefits | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> <input type="checkbox"/> _____ | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Automotive Insurance Benefits | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> <input type="checkbox"/> _____ | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Any other Disability Benefits | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> <input type="checkbox"/> _____ | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Employer Sponsored Retirement / Pension Plan Income | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> <input type="checkbox"/> _____ | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Self Employment Income or other | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> <input type="checkbox"/> _____ | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Old Age Security | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> <input type="checkbox"/> _____ | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Other: _____ | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> <input type="checkbox"/> _____ | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |



Authorizations and Declarations

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| <p>AUTHORIZATIONS</p> | <p>I hereby authorize any physician or practitioner, hospital, clinic or other medical or medically related facility that I have attended, and any insurance company, government agency, provincial health insurer, Canada Revenue Agency, institution, organization or person, that has any records or knowledge of me or my health to release full particulars thereof including all prior medical history and present condition to The Wawanesa Life Insurance Company, its reinsurers or its Associates for the purposes of administering my disability claim.</p> <p>I also authorize my insurer, Wawanesa Life, or its reinsurers, to exchange the personal information obtained during my claim under this plan, with the insurer's reinsurers and any other of my insurers. I further authorize my insurer to include this personal information in any other files which my insurer currently holds respective of me, or which may be opened in the future by my insurer, for use in accordance with the object of such other files.</p> <p>I understand that by furnishing this form and investigating the claim or by accepting Proofs of Claim, The Wawanesa Life Insurance Company shall not be held to admit the validity of any claim and not to have waived any of its rights in defense of any claim arising under the plan.</p> |
| <p>CONSENT & DISCLOSURE REGARDING PERSONAL INFORMATION</p> | <p>I consent to Wawanesa Life collecting, using and disclosing my personal information for the purposes of: establishing and maintaining communications with me; underwriting risks on a prudent basis; investigating and paying claims; detecting and preventing fraud; offering and providing products and services to meet my needs; compiling statistics and acting as required or authorized by law.</p> <p>I understand that Wawanesa Life may share my personal information with the following people, organizations and service providers: Wawanesa Life employees who require this information to perform their jobs; claims investigators, investigative agencies, providers of information processing and storage, programming, printing, mailing and distribution services; applicable reinsurance companies; people to whom I have granted access; and people who are legally authorized to view my personal information. These people, organizations and service providers may be in other provinces or in jurisdictions outside Canada. My information may be shared as required by the laws of those jurisdictions. I understand that any restriction or withdrawal of my consent may result in Wawanesa Life being unable to process the claim being applied for.</p> <p>You can obtain further information about Wawanesa Life's Personal Information Protection Policy and practices concerning service providers outside Canada from www.wawanesalife.com or from our Customer Service Department, Wawanesa Life, 400-200 Main Street, Winnipeg, MB R3C 1A8.</p> <p>If you have a question (including a question concerning our collection of personal information or the collection, use, disclosure or storage of personal information by service providers outside Canada on our behalf) or complaint regarding our privacy policies or procedures, please contact the individual accountable for our personal information protection compliance: Privacy Officer, The Wawanesa Life Insurance Company, 400-200 Main Street, Winnipeg, Manitoba R3C 1A8.</p> |
| <p>DECLARATION AND SIGNATURE</p> | <p>I hereby declare that the foregoing answers are true and complete; that, to the best of my knowledge and belief, I have withheld no material facts from Wawanesa Life and that the foregoing answers and statements are made with the object of securing the benefit claimed.</p> <p>I confirm that I have read, understood and accepted the terms and conditions contained in the Consent & Disclosure Regarding Personal Information.</p> <p>I authorize all physicians and other persons who have attended me and all hospitals, institutions and government authorities to furnish to the Wawanesa Life Insurance Company all information in their possession or within their knowledge respecting me for the purpose of administering my disability claim.</p> <p>A photocopy or an electronic reproduction of this document will be as valid as the original.</p> <p>_____</p> <p>WLI# _____</p> <p>Plan Member ID# Plan Member's Name (Print)</p> <p>_____</p> <p>Date (yy/mm/dd) Plan Member's Signature</p> |