

Master Trust

Personal Circumstances Questionnaire



MASTER TRUST PERSONAL CIRCUMSTANCES QUESTIONNAIRE

INSTRUCTIONS FOR COMPLETION

This Questionnaire is to be completed by the Legal Personal Representative* of the deceased Member.

* The Legal Personal Representative is the person (or people) who takes on the responsibility for the Member's possessions. In a Will they are usually named as executors, or if there is no Will they are referred to as the Administrator(s) (the person or people authorised by Letters of Administration to administer the estate in accordance with law).

SECTION 1: Deceased Member's Personal Details

Title: (Mr/Mrs/Ms/Other)	
First name(s):	Surname:
Date of Birth:	Date of death:
Marital status at date of death: (Please tick): Single ☐ Married ☐ Civil Partner ☐ Separated ☐ Divorced/Dissolved ☐	
Note: Please attach the marriage/civil partnership/divorce certificate(s) (as applicable).	

If Married or in a Civil Partnership (or separated but not divorced/dissolved) at Date of Death:

Date of marriage/civil partnership:
Full name of legal spouse/civil partner:
Date of birth of legal spouse/civil partner:
Current address of legal spouse/civil partner (Including Post Code):

Previous Marriage(s)/Civil Partnership(s):

Was the Member previously married to/in a civil partnership with anyone other than the spouse/civil partner named above?
YES ☐ NO ☐ (Please tick):
If 'YES' please provide the following information:
Note: Please attach the marriage/civil partnership certificate(s) (as applicable).
Date of marriage/civil partnership:
Full name of previous legal spouse/civil partner:
Date of birth of previous legal spouse/civil partner:
Current address of previous legal spouse/civil partner:



Children: Please provide the following information in respect of each of the Member's children:
(Please use a separate sheet if necessary)

Note: Please attach the birth certificate(s) and/or adoption certificate(s) for each child (as applicable).

Full name of first child:		
Date of birth of first child:		
Please state the first child's relationship to the Member: (Please tick)		
Natural child ☐ Stepchild ☐ Legally Adopted ☐ Legitimised ☐		
Other child living permanently as part of the Member's household ☐		
Current address of first child:		
Is the first child in full-time education? (Please tick) YES ☐ NO ☐		
Was the first child financially dependent upon the Member? (Please tick) YES ☐ NO ☐		
Full name of second child:		
Date of birth of second child:		
Please state the second child's relationship to the Member: (Please tick)		
Natural child ☐ Stepchild ☐ Legally Adopted ☐ Legitimised ☐		
Other child living permanently as part of the Member's household ☐		
Current address of second child:		
Is the second child in full-time education? (Please tick) YES ☐ NO ☐		
Was the second child financially dependent upon the Member? (Please tick) YES ☐ NO ☐		
Full name of third child:		
Date of birth of third child:		
Please state the third child's relationship to the Member: (Please tick)		
Natural child ☐ Stepchild ☐ Legally Adopted ☐ Legitimised ☐		
Other child living permanently as part of the Member's household ☐		
Current address of third child:		
Is the third child in full-time education? (Please tick) YES ☐ NO ☐		
Was the third child financially dependent upon the Member? (Please tick) YES ☐ NO ☐		
Full name of fourth child:		
Date of birth of fourth child:		
Please state the fourth child's relationship to the Member: (Please tick)		
Natural child ☐ Stepchild ☐ Legally Adopted ☐ Legitimised ☐		
Other child living permanently as part of the Member's household ☐		
Current address of fourth child:		
Is the fourth child in full-time education? (Please tick) YES ☐ NO ☐		
Was the fourth child financially dependent upon the Member? (Please tick) YES ☐ NO ☐		

**Other Dependants:**

Was anyone else financially dependent upon the Member at the date of death?

YES ☐ NO ☐ (Please tick) If 'YES' please provide the following information for each dependant:

Please include anyone who was partially dependent upon the Member (e.g., Partner) or who was dependent due to physical or mental impairment, but NOT children.

Full name of dependant:

Date of birth of dependant:

Relationship to the Member:

Current address of dependant:

Reason for dependency:

Level of dependency: (Please tick) Total ☐ Partial ☐

It may be necessary for us to write to the dependant named above to request proof of dependency.

Additional Information:

Did the Member leave a Will?

YES ☐ NO ☐ (Please tick): If 'YES' please attach a copy of the Will.

Have probate or letters of administration been obtained?

Please confirm the size of the Member's estate:

Please provide any further information which you feel the Trustees should know before making their decision:

Additional Comments:



SECTION 2: Data Protection

I understand that the use of any information provided by me within or in addition to this form is for the purpose of processing and management of the claim, handling customer concerns and the detection, prevention and investigation of fraud.

I understand that the information provided by me within or in addition to this form will be shared with the Trustee(s) (and its advisers) who, in accordance with the Data Protection Act 2018, need to process and store the data provided within this form (including any enclosures and attachments) in order to exercise their discretion in relation to death benefits payable from Risk Assurance Management Limited Master Trust.

I confirm that all persons named on this form (or their representative/guardian) have been made aware that their information will be submitted for these purposes.

I understand the data will be processed fairly and securely and the details will be stored in line with UK Data Protection Law and will not be kept longer than necessary.

Details of the Trustee's Privacy Notice are available to view here:

[Sole Trustee Data Privacy Notice | Pi Partnership.](#)

Details of Risk Assurance Management Limited's Data Privacy Notice are available to view on our website: www.ram-ltd.co.uk/privacy.

Details of the underwriter's Privacy Notice is available to view here:

www.shepherdsfriendly.co.uk/privacy-policy.

SECTION 3: Declaration

I declare that the information provided by me within or in addition to this form is true and correct to my knowledge and belief.

Title: (Mr/Mrs/Ms/Other:	
Full name:	
Current address:	
Telephone Number:	Email Address:
Relationship to the Member:	
Signature:	
Date:	



Potential Additional Requirements:

It is possible that the Trustees may require further information from the Personal Representative(s). If there are additional requirements, they will be requested at that time.

Document Checklist (please tick as appropriate)

Deceased Member's Will ☐

Marriage certificate ☐ Civil partnership certificate ☐ Divorce certificate ☐

Birth certificate(s) ☐ (for each child listed)

Adoption certificate(s) ☐ (for each child listed if one or more children are adopted)

Please return this form and supporting documents to:
The Claims Department, Risk Assurance Management Limited
Email: MasterTrust@ram-ltd.co.uk



Risk Assurance Management Limited. Policies underwritten by The Shepherds Friendly Society Limited (FRN 109997)

Risk Assurance Management Limited is authorised and regulated by the Financial Conduct Authority (FRN 306891)

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