



# Helping you navigate a difficult time

## A beneficiary checklist for life insurance and annuities

Please accept our heartfelt sympathy for the recent loss of your loved one. We know what a difficult time this can be and that filing a life insurance claim can add to the stress you're already feeling.

Our goal is to support you and pay your claim as quickly as possible, so you can focus on taking care of yourself and your family.

We've created this checklist to help you prepare for submitting a claim and to make the process a smooth one. It's for your personal use and does not need to be returned to Nationwide®.

### What do I need when filing a claim with Nationwide®?

**Your loved one's name** (they may also be referred to as the insured for a life insurance policy or as an annuitant or contract owner for annuities)

**Their date and location of passing** (if it occurred in a foreign country, additional documentation is needed)

**Their policy number for life insurance or contract number for an annuity** (if you don't know, visit [Nationwide.com/LifeClaims](https://www.nationwide.com/LifeClaims) for help)

**A copy of the death certificate** (the funeral home director can help you, if needed)

**The beneficiary's name, date of birth,<sup>1</sup> Social Security number and address** (if the beneficiary is an estate, trust or organization, additional information may be needed)

**The beneficiary's bank routing number and account number for the claim proceeds**

### Tips to help expedite your claim

- Provide documents to your claims specialist via email whenever possible
- Use our secure DocuSign service to accelerate your claim submission
- Choose electronic direct deposit as the payment method

<sup>1</sup> Nationwide will not pay insurance proceeds to minors. A court-appointed guardian of the estate, conservator, custodian under a state's Uniform Transfers to Minors Act or a trust are customary recipients of funds payable on behalf of a minor. Please contact your legal advisor for options to satisfy your objectives and facilitate the timely availability of moneys intended for the minor's benefit.

## Other things to consider

### Notify other important contacts of your loved one's passing, such as:

- Their employer or workplace benefit providers
- The Social Security Administration or other retirement income or benefit providers
- Their bank to manage automatic payments, credit cards or loans

### Address other products or policies your loved one has with Nationwide or other companies, including:

- Auto or property insurance (for claims support, contact 1-800-421-3535)
- IRAs or other retirement accounts
- Mutual funds or other investment accounts (contact 1-800-848-0920)

### Contact professionals if you need help as you settle your loved one's unique estate needs, such as:\*

- Insurance professionals
- Tax advisors
- Estate planning attorneys
- Financial professionals
- Grief counselor

\*Many times, your loved one will have relationships already established with these professionals. If not, discuss recommendations with other family members or friends to find a professional you feel comfortable working with.

**If you don't have a financial professional,** contact us at **1-844-457-7982** or visit [Nationwide.com/BeneficiarySupport](https://www.nationwide.com/BeneficiarySupport).

We'll work with you directly or connect you with an experienced financial professional in your area who can offer guidance and options for your claim proceeds.

# We're here if you need us

If you have questions or are ready to start the claims process, please contact us at **1-800-848-6331** or [Nationwide.com/LifeClaims](https://www.nationwide.com/LifeClaims).

You can also check the status of your claim by calling the number above. We're here weekdays from 8 a.m. to 8 p.m. ET.



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