



TD Insurance
Instructions for completing the claim package for
Credit Protection Critical Illness Insurance -
Acute Heart Attack (Myocardial Infarction)

This insurance benefit is underwritten by The Canada Life Assurance Company ("Canada Life"), and TD Life Insurance Company ("TD Life") is the authorized administrator. TD Life will be managing this claim on behalf of Canada Life.

The Credit Protection Critical Illness Insurance - Acute Heart Attack (Myocardial Infarction) Claim Package contains three parts:

- **Part A: Claim for Credit Protection Critical Illness Insurance.**
- **Part B: Claimant's Statement for Credit Protection Critical Illness Insurance - Acute Heart Attack (Myocardial Infarction).**
- **Part C: Attending Physician's Statement of Critical Illness Insurance - Acute Heart Attack (Myocardial Infarction).**

Note:

- Please print all information using a pen.
- Initial all corrections/changes, including any changes you make with correction fluid (liquid paper).
- Completion of all three parts is required and any missing information may result in the delay of the processing of your claim.
- Checkboxes are provided below to assist you in completing the claim package.
- Within 10 business days of receiving your claim package, a claims analyst will send you a confirmation of receipt in writing.
- If you have any questions, please contact the TD Life Claims Department at 1-888-983-7070.

Instructions for Claimant

Check if completed

- Please visit your local TD Canada Trust branch to have a branch representative complete **Part A - Claim** for Credit Protection Critical Illness Insurance.
- Please complete **Part B - Claim for Credit Protection Critical Illness Insurance - Acute Heart Attack (Myocardial Infarction)**.
 - Be sure to print your first and last name, date and sign all entries and include your telephone number.
 - If you are not the Insured, you must be an authorized representative of the Insured.
- Please ensure that both sections of **Part C - Attending Physician's Statement of Critical Illness Insurance - Acute Heart Attack (Myocardial Infarction)** is completed.

Section 1 - Patient's Authorization - the Insured/patient's signature and date are required.

Section 2 - Attending Physician's Statement **must be completed and signed by a licensed medical practitioner.**

Note: Part C of this document can be detached and provided to the Attending Physician to complete and send separately to TD Life Insurance Company - Claims Department.

- Retain a photocopy of the completed claim package for your records.
- Return the original forms to:

TD Insurance
 Claims Department
 P.O. Box 1
 TD Centre
 Toronto, Ontario M5K 1A2

OR

You may bring the original forms back to your TD Canada Trust branch in a sealed envelope to be sent to TD Life.

Instructions for Branch

- Please complete **Part A - Claim for Credit Protection Critical Illness Insurance.**
- Be sure to enter the branch transit number, address, telephone number and name of contact person, should it be necessary for the TD Life Claims department to contact you.
- The Claimant may mail the claims package directly to TD Life or, if they wish, they may ask you to send the forms to us in the **TD Insurance green vinyl bag.**

PART A - Claim for Credit Protection Critical Illness Insurance

Statement of Claim (To be completed by your TD Canada Trust representative)

Product:

Mortgage

Line of Credit

Branch/Transit Number: _____

Mortgage/Line of Credit number: _____

Please provide details of any other credit insured mortgages, lines of credit or loans held by the Insured at TD Canada Trust.

Name of the Insured: _____
(Last Name) (First Name and Initial)

Address of the Insured: _____
(Number) (Street)

(City) (Province) (Postal Code)

Insured Date of Birth: _____ Date of Critical Illness: _____
(Month, Day, Year) (Month, Day, Year)

Current Principal Balance	Date of Last Regular Payment <small>(Month, Day, Year)</small>	Insurance Effective Date <small>(Month, Day, Year)</small>
Date Funds Advanced <small>(Month, Day, Year)</small>	Initial Mortgage Amount, or Line of Credit Limit	Refinancing Details <input type="checkbox"/> Yes <input type="checkbox"/> No

Branch Comments

Branch Contact: _____
(Last Name) (First Name)

Signature: _____

Title: _____ Date: _____
(Month, Day, Year)

Telephone Number: () -

PART B - Claimant's Statement for Credit Protection Critical Illness Insurance - Acute Heart Attack (Myocardial Infarction)

Statement of Claim (Completed by Claimant)

Section 1 - Claimant's Statement

Ms. Mrs. Mr.

Name of Claimant: _____
(Last Name) (First Name and Initial)

Address: _____
(Number) (Street)

(City) (Province) (Postal Code)

Date of Birth: _____
(Month, Day, Year)

Telephone Number: () _____ - _____ Alternate Telephone Number: () _____ - _____

If you are not the Insured, what is your relationship to the Insured? _____

1. Claim and related details

a) Please provide details of your Critical Illness.

b) On what date was your condition diagnosed or surgery performed? _____

c) (i) On what date did symptoms first commence? _____

(ii) Please describe these symptoms.

d) On what date did you first consult a medical practitioner in connection with your illness? _____

e) Have you undergone any tests or investigations related to the diagnosis? Yes No

If yes, please provide details and dates.

f) Have you previously suffered from, or received treatment for, a similar or related condition? Yes No

If yes, please give details including dates.

2. Medical Consultations

a) (i) Please provide the name, address and phone number of your personal physician.

(ii) How long has he/she been your personal physician? _____

b) Please list the names, addresses and phone numbers of physicians seen in the past 5 years, other than those listed in a) (i) above.

c) List the names and locations of all hospitals and/or institutions where you were treated in the past 5 years, (include admission and discharge dates).

d) Please provide the names, addresses and phone numbers of any other physicians or specialists who have been consulted in connection with your current illness.

e) What treatment have you received and are you currently receiving in connection with your condition?

Type of treatment	Institution/Physician	Dates	
		From	To

3. General

a) Have any of your immediate family (mother, father, brother(s), sister(s)) had cancer, tumour, heart disease, diabetes, kidney disease, stroke, or suffered from a similar or related condition? Yes No

b) If yes, list relationship, condition, age at which illness was first diagnosed, and date of diagnosis.

Relationship	Condition	Age at which illness was first diagnosed	Date of Diagnosis (Month, Day, Year)

c) Please provide any further information which you think might be helpful in support of your claim.

Critical Illness Insurance - Claim Authorization

Insurer: The Canada Life Assurance Company ("Canada Life")

Claimant's Authorization and Declaration

- I declare that all the statements made in this claim form are accurate, true and complete. I understand that making false, misleading or incomplete statements may cause not only the claim to be denied, but insurance coverage to be rescinded by the Insurer.
- I hereby authorize and request any physician, hospital, clinic, individual, law enforcement or government organization, insurance company, worker's compensation body, current or former employer, or other entity that has any personal and medical records, information or knowledge in regard to the Insured (if other than the Claimant), to release and provide full details (including furnishing copies) of all available personal and medical information records and knowledge, including prior medical history, toxicological or pathological findings which they may possess to the above noted Insurer in regard to this claim, its re-insurers or their respective agents. This information is to be used in the evaluation of an insurance claim and for purposes relating to such claim.
- I also authorize the Insurer, its reinsurers and its respective agents to exchange and/or transmit information concerning this claim to the organizations listed above as is necessary to evaluate this claim. This consent shall be valid during the continuation of such claim.
- I further authorize the Insurer or its administrator to release information relating to this claim (however, not including medical information) to The Toronto-Dominion Bank to allow the bank to manage the credit facility related to this insurance.

If I am not the Insured:

- In providing this authorization to collect personal information about the Insured relating to this claim, I the undersigned do hereby certify that I have appropriate permission from the Insured to authorize the collection, use and disclosure of their personal information as authorized above and that the Insurer and its agents and reinsurers may rely and act upon my authorization.

Signed at: _____

Claimant: _____
(Print Last name, First name and initial)

Claimant's Signature: _____ Date: _____
(Month, Day, Year)

PART C - Attending Physician's Statement for Critical Illness - Acute Heart Attack (Myocardial Infarction)

Section 1 - Patient's Authorization

Ms. Mrs. Mr.

Patient's Name (Please Print): _____

Date of Birth: _____
(Month, Day, Year)

I hereby authorize the release of any information requested in respect of this claim, to the Insurer, The Canada Life Assurance Company and its authorized claims administrator, TD Life Insurance Company.

Date: _____ Signature of Patient: _____
(Month, Day, Year)

Section 2 - Attending Physician's Statement (Completed by Physician)

This form has been specifically designed with the Physician in mind. By being comprehensive, it will hopefully reduce the physician's administrative workload. Please complete the sections relating to your patient and strike out non-applicable areas. In order to help the Claimant, sufficient details of family and medical history, investigation, findings and treatment are essential.

The patient is responsible for securing this form and any charge which may be made for its completion.

The above named is insured with The Canada Life Assurance Company against the happening of certain contingent events associated with his/her health. A claim has been submitted in connection with **Acute Heart Attack** and, to enable the assessment of the claim, we would be grateful for your cooperation on the completion of this form.

1. a) On what date did your patient first consult you for this condition? _____

b) How long has the Insured been your patient? _____

2. a) When did the acute myocardial infarction occur? _____

b) On what date was the diagnosis made?

c) Please provide the name of the cardiologist who made the diagnosis of acute myocardial infarction (if other than yourself).

3. Please attach copies of:

a) **Serial (ECG) from the hospital admission.**

b) **All prior ECGs for this patient for the last 24 months.**

c) **All laboratory tests showing cardiac biomarkers and/or enzymes from hospital admission.**

d) **Copy of discharge summary from hospitalization.**

4. Please provide the names and addresses of other physicians consulted or hospitals attended by your patient for this acute heart attack.

5. What other investigations have been performed? Please provide dates and details, or reports.

6. When did your patient first suffer symptoms or episodes of cardiovascular disease?
Please provide details and dates:

7. Is there any immediate family history of cancer, tumour, heart disease, diabetes, kidney disease, stroke or suffered from a similar or related condition? Yes No

If yes, list condition, date of diagnosis and nature of illness.

Condition	Nature of illness	Date of Diagnosis (Month, Day, Year)

Attach any specialist report, if available.

You may mail or fax this form to the Administrator below:

TD Insurance
Claims Department
P.O. Box 1
TD Centre
Toronto, Ontario M5K 1A2
Tel: 1-888-983-7070
Fax: 416-308-1223 / 1-877-838-2163

Declaration: These statements are true and complete to the best of my knowledge and belief.

Physician's Signature: _____ Date: _____
(Month, Day, Year)

Specialty: _____

Print Name: _____

Address: _____

Telephone Number: () - -

Fax Number: () - -

Thank you for taking the time to complete this form.