

## EXCLUDED STAFF LTD PLAN

### TO THE EMPLOYEE: CHECKLIST - HOW TO SUBMIT A LONG TERM DISABILITY (LTD) CLAIM

- Obtain claim forms from your employer.**
  - Ask your employer to explain the details of your LTD coverage and the claims process to you.**
  - Read the “Questions and Answers” brochure.** It describes the LTD benefit and contains important information.
  - Take the “Attending Physician’s Statement” and “To the Doctor” sheet to your doctor.** Ask your doctor to complete all sections of the Attending Physician's Statement and attach any test results or reports from specialists. Your doctor will either give this information to you or send it directly to Canada Life. If all the information is not received from your doctor, it may delay your claim. (If you cannot obtain the specialists' reports from your family doctor, you should obtain them directly from the specialists.) Keep a copy.
  - Apply for all other disability income that you may be eligible for.** For example: disability benefits from WorkSafeBC, ICBC and/or Employment Insurance. You may also be eligible for CPP disability benefits if your disability is severe and prolonged. (See the separate sheet on where to apply for these benefits.)
  - Complete all sections of the “Claimant's Statement”.** Attach any information concerning your claims for WorkSafeBC, ICBC and/or CPP disability benefits. Keep a photocopy.
  - Complete the Direct Deposit authorization form** for Canada Life in order to have LTD payments transferred directly into your bank account.
  - Submit the following completed forms and documentation as soon as possible to Canada Life at:**
    - Vancouver Office: Suite #1500 – 1055 Dunsmuir Street, Vancouver, BC V7X 1K8  
([Vancouver.DMSO@canadalife.com](mailto:Vancouver.DMSO@canadalife.com)); or
    - Langley Office: Suite #500 – 19933 – 88th Avenue, Langley, BC V2Y 4K5  
([Langley.DMSO@canadalife.com](mailto:Langley.DMSO@canadalife.com))
- or to your employer:**
- Medical forms (your doctor can send them directly to Canada Life or you can submit them in a sealed envelope).
  - Claimant’s Statement
  - Direct Deposit form
  - Information on any other disability income (e.g. WorkSafeBC, ICBC and/or CPP)
  - Tax forms (TD1 and TD1BC)
  - Proof of age (copy of your driver’s license, birth certificate or passport)