



APPLICATION FOR PROVIDENT BENEFITS (APB) CLAIM

HQP-PFF-285
(V05, 02/2020)

(To be filled out by member/claimant. Print this form back to back on one single sheet of paper)

TYPE OR PRINT ENTRIES

CLAIM FILE No.

MEMBERSHIP PROGRAM Pag-IBIG I MODIFIED Pag-IBIG II (MP2)

REASON FOR CLAIM (Check appropriate box)
MEMBERSHIP TERM MATURITY
RETIREMENT
PERMANENT TOTAL DISABILITY/INSANITY
TERMINATION FROM SERVICE BY REASON OF HEALTH
CRITICAL ILLNESS OF THE MEMBER OR ANY OF HIS IMMEDIATE FAMILY MEMBER
OPTIONAL WITHDRAWAL
PERMANENT DEPARTURE FROM THE COUNTRY
DEATH
EXPATRIATE
MODIFIED Pag-IBIG II (MP2) MATURITY

MEMBER'S PERSONAL DETAILS

LAST NAME FIRST NAME NAME EXTENSION (e.g., Jr., II) MIDDLE NAME MAIDEN NAME (For married women)

DATE OF BIRTH MARITAL STATUS (Single/Unmarried, Married, Widow/er, Legally Separated, Annulled) Pag-IBIG MID No./RTN

CLAIMANT, if other than the Member (Last Name, First Name, Name Extension, Middle Name) RELATIONSHIP TO MEMBER

ADDRESS AND CONTACT DETAILS

MEMBER'S PRESENT HOME ADDRESS (Unit/Room No., Floor, Building Name, Lot No., Block No., Phase No., House No., Street Name, Subdivision) MEMBER/CLAIMANT CONTACT DETAILS (COUNTRY + AREA CODE, TELEPHONE NUMBER)

Barangay Municipality/City Province/State/Country (if abroad) ZIP Code Home

CLAIMANT'S PRESENT HOME ADDRESS (Leave blank if the same as member) (Unit/Room No., Floor, Building Name, Lot No., Block No., Phase No., House No., Street Name, Subdivision) Cell Phone (Required)

Barangay Municipality/City Province/State/Country (if abroad) ZIP Code Email Address

EMPLOYMENT DETAILS FROM DATE OF Pag-IBIG MEMBERSHIP (Use another sheet if necessary)

Table with columns: EMPLOYER/BUSINESS NAME, EMPLOYER/BUSINESS ADDRESS, DATE OF Pag-IBIG MEMBERSHIP (FROM, TO)

AUTHORITY TO CREDIT AUTHORITY TO TRANSFER

IN THE EVENT OF THE APPROVAL OF MY APPLICATION FOR PROVIDENT BENEFITS CLAIM, I HEREBY AUTHORIZE Pag-IBIG FUND TO CREDIT MY CLAIM PROCEEDS TO MY PAYROLL ACCOUNT/DISBURSEMENT CARD THAT I HAVE INDICATED BELOW:

PAYROLL ACCOUNT/DISBURSEMENT CARD No. BANK'S ADDRESS MP2 ACCOUNT NO. AMOUNT TO BE TRANSFERRED

SIGNATURE OF MEMBER DATE SIGNATURE OF MEMBER DATE

APPLICATION AGREEMENT

I hereby certify that I have read and understood the contents hereof, including the guidelines and instructions indicated at the back portion of this form. I further certify under pain of perjury that all information I have indicated herein are true and correct to the best of my knowledge and belief, and that my signature or thumbmark appearing herein is genuine and authentic. I likewise understand that the processing of this application is subject to pertinent provisions of the implementing rules and regulations of the Pag-IBIG Fund. In the event of any outstanding Pag-IBIG loan, Pag-IBIG Fund is hereby authorized to withhold, in whole or in part, the provident benefit subject of this claim, and apply the same as payment to the said loan as well as other obligations due to the Pag-IBIG Fund as of the date of this application. I hereby waive my rights under R.A. No. 1405 and authorize Pag-IBIG Fund to verify/validate my payroll account/disbursement card number.

THUMBMARKS OF MEMBER/CLAIMANT (If unable to sign)

LEFT THUMB RIGHT THUMB (To be done in the presence of Pag-IBIG Fund Personnel)

MEMBER/CLAIMANT (Signature over Printed Name) (Signature over Printed Name of Witness) Date

THIS PORTION IS FOR Pag-IBIG Fund USE ONLY

CLAIMS/HL/STL/LOYALTY CARD VERIFICATION

Table with columns: PARTICULARS, WITH, WITHOUT, DV/CHECK/PN/APPLICATION/HL ID NO., DATE FILED/HL TAKEOUT DATE, OUTSTANDING BALANCE, AS OF, VERIFIED BY, DATE

PAYEE/S (Use another sheet if necessary) REMARKS

RECEIPT OF APPLICATION

RECEIVED BY DATE REVIEWED BY DATE APPROVED BY DATE

DISAPPROVED BY DATE REMARKS

GUIDELINES AND INSTRUCTIONS

A. When to File

The Application for Provident Benefits Claim (APB [HQP-PFF-285]) may be filed upon the occurrence of any of the following:

1. Membership Maturity - shall be based on 20 years of membership with the Fund, reckoned from the initial Pag-IBIG Fund Receipt (PFR) date; provided, the member has remitted a total of 240 monthly membership savings to the Fund at the time of maturity;
2. Retirement - a member shall be compulsorily retired under the Fund upon reaching the age of 65. A member may opt to retire earlier under the Fund upon the occurrence of any of the following events:
 - a. Actual retirement from the SSS, GSIS, or from government service by provision of law;
 - b. Retirement under a private employer's provident/retirement plan, provided that the member is at least 45 years of age at the time of retirement;
 - c. Reaching the age of sixty (60).
3. Permanent Total Disability (PTD) or Insanity – PTD refers to the loss or impairment of a physical or mental function resulting from injury or sickness, which incapacitates said member to perform any work or engage in any business or occupation;
4. Critical illness of the member or any of his immediate family member, as certified by a licensed physician, under any of the following categories, subject to the approval of Deputy Chief Executive Officer-Member Services Cluster:
 - a. Cancer
 - b. Organ Failure
 - c. Heart-related Illness
 - d. Stroke
 - e. Neuromuscular-related Illness

The immediate family member includes any of the following:

- Spouse
 - Parent
 - Children
 - Sibling
 - Grandparents
 - Grandchildren
 - Legally adopted children shall only be included insofar as applications for withdrawal of savings of their adoptive mothers or adoptive fathers
5. Termination from Service by Reason of Health - a member can no longer render service to an employer due to severe health conditions, as certified by his doctor;
 6. Death;
 7. Permanent Departure from the Country - a member has been permitted by his host country to remain there indefinitely or has permanently left the Philippines to reside in another country;
 8. Optional Withdrawal of Pag-IBIG Savings
 - a. Members of the Fund after the effectivity of R.A. 9679 shall have the option to withdraw his or her TAV on the fifteenth (15th) year of continuous membership. Provided the said member has no outstanding loan with the Fund at the time of withdrawal. This option may be exercised only once during the membership term;
 - b. A member eligible for optional withdrawal after completing 180 contributions monthly savings may opt to withdraw an amount less than the equivalent sum of said 180 monthly savings. The remaining TAV together with succeeding savings shall be released to the member upon the occurrence of any of the grounds for membership termination.

c. Any other reasons as may be approved for by the Board.

B. Who May File

The application may be filed by the member, his guardian, or any authorized representative/s. If the reason for claim is death of the member, the application may be filed by his heir/s or the latter's representative/s, or any appointed court administrator or executor.

C. Payment of Benefits

1. Return of Total Accumulated Value

- a. The TAV to be returned to the member or his legal heirs, less of any and all pending obligations with the Fund, shall consist of member's remitted accumulated savings; employer's counterpart savings, if applicable; and dividend earnings credited to the member's account as declared by the Board.
- b. For members with outstanding obligations with the Fund, at the time of termination of membership, the said obligation shall be deducted from his TAV prior to the release of the provident claim.
- c. Release of member's TAV shall be based on actual savings remitted by the employee and employer, if applicable. In the case of member-claimants whose employer counterpart savings have not been remitted to the Fund, a partial release of their TAV shall be made based on actual amounts credited to their accounts. In the same manner, the computation of annual dividends shall be based on actual remittances made. Any amount that the Fund may collect from the employer due to enforcement shall be subsequently released to the member or his heirs.
- d. In case of member's death, the release of his provident benefit claims shall be in accordance with the laws on succession.
- e. A member who has multiple employers shall be entitled to claim his entire savings anytime upon occurrence of any of the grounds for membership termination.

2. Death Benefit

- a. Upon the death of a member, his legal heirs shall be entitled to receive the applicable death benefit in addition to the deceased member's TAV. The amount of the death benefit shall depend on his membership status with the Fund at the time of his death.
 - For active members at the time of death – P6,000, regardless of the amount of TAV.
 - For inactive members at the time of death – the amount is equivalent to member's TAV or P6,000, whichever is lower.
 - If TAV offsetting occurred prior to the member's death – the amount of death benefit to be granted shall depend on the membership status as of date of death. In case of inactive status as of date of death, the TAV under consideration shall be the TAV prior to offsetting.
- b. The legal heirs of the deceased member shall still be entitled to death benefit, subject to the conditions set and under the following circumstances:
 - The check for provident benefit claims based on the grounds for membership termination other than death is not yet released to the member;
 - The member's provident benefit claim proceeds are not yet credited to his disbursement/cash card or Payroll Account at the time of his death.

3. Manner of Payment

- a. Shall be paid to the member or his legal heirs through any of the following modes:
 - Crediting to the claimant's disbursement/cash card or Payroll Account;
 - Through check payable to the claimant; or
 - Other similar modes of payment approved by the Board.
- b. Claiming of checks through a representative shall be allowed provided the representative shall present the documents that the Fund may require relative to the provident benefit claim.