



PROVIDENT BENEFITS CLAIM CHECKLIST OF REQUIREMENTS

HQP-PFF-377
(V03, 09/2021)

MEMBER/CLAIMANT

A. Membership Maturity/Optional Withdrawal

1. Application for Provident Benefits (APB) Claim (HQP-PFF-285) (1 Original)
2. Pag-IBIG Loyalty Card/Loyalty Card Plus or one (1) valid ID of the member (1 Photocopy)

B. Retirement

Compulsory Retirement

1. Application for Provident Benefits (APB) Claim (1 Original)
2. Pag-IBIG Loyalty Card/Loyalty Card Plus or one (1) valid ID of the member (1 Photocopy)
3. Order of Retirement Voucher (*For members of AFP, PNP, BJMP, BFP*) (1 Photocopy)
4. Statement of Service (*For member of AFP*) (1 Photocopy)
5. Service Record (*For members of PNP, BJMP, BFP*) (1 Photocopy)

Optional Retirement

1. Application for Provident Benefits (APB) Claim (1 Original)
2. Pag-IBIG Loyalty Card/Loyalty Card Plus or one (1) valid ID of the member (1 Photocopy)
3. Certificate of Early Retirement (*For private employees who are at least 45 years old*) (1 Photocopy)
4. GSIS Retirement Voucher (*For government employees*) (1 Photocopy)

C. Permanent Total Disability (PTD) or Insanity

1. Application for Provident Benefits (APB) Claim (1 Original)
2. Pag-IBIG Loyalty Card/Loyalty Card Plus or one (1) valid ID of the member (1 Photocopy)
3. Physician's Certificate/Statement (*With Clinical or Medical Abstract*) (1 Original)

D. Critical illness of the member or any of his immediate family member

1. Application for Provident Benefits (APB) Claim (1 Original)
2. Pag-IBIG Loyalty Card/Loyalty Card Plus or one (1) valid ID of the member (1 Photocopy)
3. Marriage Certificate issued by Philippine Statistics Authority (PSA) or Local Civil Registry Office (LCRO) and Advisory on Marriage issued by PSA (*If the immediate family member is the claimant*) (1 Photocopy)
4. Birth Certificate issued by PSA or LCRO or Baptismal Certificate (1 Photocopy)
5. Non-availability of Birth Record issued by PSA (1 Photocopy) and Joint Affidavit of Two Disinterested Persons (HQP-PFF-029,) (1 Original)
6. Physician's Certificate/Statement (*With Clinical or Medical Abstract*) (1 Original)
7. To establish kinship with the member, the claimant shall submit any of the following:
 - Birth Certificate issued by PSA or LCRO or Baptismal Certificate (1 Photocopy); or
 - Non-availability of Birth Record issued by PSA (1 Photocopy) and Joint Affidavit of Two Disinterested Persons (HQP-PFF-029) (1 Original)

E. Termination from Service by Reason of Health

1. Application for Provident Benefits (APB) Claim (1 Original)
2. Pag-IBIG Loyalty Card/Loyalty Card Plus or one (1) valid ID of the member (1 Photocopy)
3. Physician's Certificate/Statement (*With Clinical or Medical Abstract*) (1 Original)

F. Death

Death Claim - Married with Child/Children

1. Application for Provident Benefits (APB) Claim (1 Original)
2. **Pag-IBIG Loyalty Card/Loyalty Card Plus or one (1) valid ID of the claimant (1 Photocopy)**
3. Death Certificate of Member issued by PSA or LCRO (1 Photocopy)
4. Proof of Surviving Legal Heirs (HQP-PFF-030) (1 Original)
5. Marriage Certificate issued by PSA or LCRO and Advisory on Marriage issued by PSA (*If the immediate family member is the claimant*) (1 Photocopy)
6. Birth Certificate issued by PSA or LCRO or Baptismal Certificate (1 Photocopy)
7. Declaration of Guardianship (HQP-PFF-028) (If with child/children below 18 years old, or if child/children is/are physically or mentally incompetent) (1 Original)
8. To establish kinship with the member, the claimant shall submit any of the following:
 - Birth Certificate issued by PSA or LCRO or Baptismal Certificate (1 Photocopy); or
 - Non-availability of Birth Record issued by PSA (1, Photocopy) and Joint Affidavit of Two Disinterested Persons (HQP-PFF-029) (1 Original)

Death Claim - Married (without child/children but with Surviving Parent/s)

1. Application for Provident Benefits (APB) Claim (1 Original)
2. **Pag-IBIG Loyalty Card/Loyalty Card Plus or one (1) valid ID of the claimant (1 Photocopy)**
3. Death Certificate of Member issued by PSA or LCRO (1 Photocopy)
4. Proof of Surviving Legal Heirs (HQP-PFF-030) (1 Original)
5. Marriage Certificate issued by PSA or LCRO and Advisory on Marriage issued by PSA (*If the immediate family member is the claimant*) (1 Photocopy)
6. To establish kinship with the member, the claimant shall submit any of the following:
 - Birth Certificate issued by PSA or LCRO or Baptismal Certificate (1 Photocopy); or
 - Non-availability of Birth Record issued by PSA (1 Photocopy) and Joint Affidavit of Two Disinterested Persons (HQP-PFF-029) (1 Original)

Death Claim - Single with Child/Children

1. Application for Provident Benefits (APB) Claim (1 Original)
2. **Pag-IBIG Loyalty Card/Loyalty Card Plus or one (1) valid ID of the claimant (1 Photocopy)**
3. Death Certificate of Member issued by PSA or LCRO (1 Photocopy)
4. Proof of Surviving Legal Heirs (HQP-PFF-030) (1 Original)
5. Certificate of No Marriage issued by PSA (*if the deceased member is single*) (1 Photocopy)
6. Birth Certificate issued by PSA or LCRO or Baptismal Certificate (1 Photocopy)
7. Declaration of Guardianship (HQP-PFF-028) (If with child/children below 18 years old, or if child/children is/are physically or mentally incompetent) (1 Original)
8. To establish kinship with the member, the claimant shall submit any of the following:
 - Birth Certificate issued by PSA or LCRO or Baptismal Certificate (1 Photocopy); or
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Death Claim - Single (Without child/children with Surviving Parent/s)

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3. Death Certificate of Member issued by PSA or LCRO (1 Photocopy)
4. Proof of Surviving Legal Heirs (HQP-PFF-030) (1 Original)
5. Certificate of No Marriage issued by PSA (*if the deceased member is single*) (1 Photocopy)
6. To establish kinship with the member, the claimant shall submit any of the following:
 - Birth Certificate issued by PSA or LCRO or Baptismal Certificate (1 Photocopy); or
 - Non-availability of Birth Record issued by PSA (1 Photocopy) and Joint Affidavit of Two Disinterested Persons (HQP-PFF-029) (1 Original)

G. Permanent Departure from the Country

1. Application for Provident Benefits (APB) Claim (1 Original)
2. Pag-IBIG Loyalty Card/Loyalty Card Plus or one (1) valid ID of the member (1 Photocopy)
3. Passport with Immigrant Visa/Residence Visa/Settlement Visa (1 Photocopy)
4. Declaration of Intention to Depart from the Philippines Permanently (HQP-PFF-031) (No need to submit if already based abroad) (1 Original)

H. Expatriates

1. Application for Provident Benefits (APB) Claim (1 Original)
2. Passport (1 Photocopy)
3. Alien Employment Permit issued by the Department of Labor and Employment (DOLE) (1 Photocopy)

I. Modified Pag-IBIG II

1. Application for Provident Benefits (APB) Claim (1 Original)
2. Pag-IBIG Loyalty Card/Loyalty Card Plus or one (1) valid ID of the member (1 Photocopy)

IMPORTANT

1. For retirement purposes, valid IDs must reflect the member's date of birth. If the valid IDs do not reflect the date of birth, submit any of the following:
 - Birth Certificate of Member issued by Philippine Statistics Authority (PSA) or Local Civil Registry Office (LCRO) or Baptismal Certificate
 - Non-availability of Birth Record issued by PSA and Joint Affidavit of Two Disinterested Persons
2. In all instance, wherein:
 - a. *Photocopies are submitted, the original document must be presented for authentication.*
 - b. *Discrepancies are noted in public documents submitted; Affidavit of Two Disinterested Persons is required for submission.*
 - c. *Discrepancies in Pag-IBIG Remittances, a certification that includes remittances by the respective employers is required.*
 - d. *Gaps in membership contribution are noted (due to LWOP, suspension, dismissal, etc.), Statement of Service (For members of AFP) or Service Record (For Members of PNP, BJMP, BFP) is required.*
3. For documents (e.g. Birth Certificate, Marriage Certificate, Death Certificate, etc.) issued abroad:
 - a. *If the issuing country is a member of The Hague Apostille Convention, the documents must be apostilled by the concerned apostillization authority/officer.*
 - b. *If not, the said document/s should be duly certified by the Philippine Consulate General/ Philippine Embassy in the country where the document was issued.*
4. *In case one/any of the legal heirs waived all the rights and interest on the Provident Benefits Claim proceeds in favor of another person, a notarized Waiver of Rights (HQP-PFF-032) shall be required.*



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