



# PROVIDENT BENEFITS CLAIM CHECKLIST OF REQUIREMENTS

HQP-PFF-377  
(V07, 12/2024)

## 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)
3. SSS Employment History (*as applicable*) (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 (*For members of AFP, PNP, BJMP, BFP*) (1 Photocopy)
4. Statement of Service (*For members of AFP*) (1 Photocopy)
5. Service Record (*For members of PNP, BJMP, BFP*) (1 Photocopy)
6. SSS Employment History (*as applicable*) (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)
5. SSS Employment History (*as applicable*) (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)
4. SSS Employment History (*as applicable*) (1 Photocopy)

### D. Critical Illness

#### Critical Illness of the 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. Physician's Certificate/Statement (*With Clinical or Medical Abstract*) (1 Original)
4. SSS Employment History (*as applicable*) (1 Photocopy)

#### Critical Illness of member's 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 claimant (1 Photocopy)
3. Physician's Certificate/Statement (*With Clinical or Medical Abstract*) (1 Original)
4. SSS Employment History (*as applicable*) (1 Photocopy)
5. To establish kinship with the immediate family member, the member shall submit any of the following:
  - Marriage Certificate issued by Philippine Statistics Authority (PSA)/National Statistics Office (NSO) or Local Civil Registry Office (LCRO) and Advisory on Marriage issued by PSA/NSO of the member (1 Photocopy); and
  - Birth Certificate issued by PSA/NSO or LCRO or Baptismal Certificate (*as applicable*) (1 Photocopy); or
    - Non-availability of Birth Record issued by PSA/NSO (1 Photocopy) and Joint Affidavit of Two Disinterested Persons (HQP-PFF-029) (1 Original) (*in the absence of the Birth Certificate or Baptismal Certificate*)

### 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)
4. SSS Employment History (*as applicable*) (1 Photocopy)

### 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/NSO or LCRO (1 Photocopy)
4. SSS Employment History (*as applicable*) (1 Photocopy)
5. Proof of Surviving Legal Heirs (HQP-PFF-030) (1 Original)
6. Declaration of Guardianship (HQP-PFF-028) (if with child/children below 18 years old, or of the child/children is/are physically or mentally incompetent) (1 Original)
7. To establish kinship with the member, the claimant shall submit the following:
  - Marriage Certificate issued by PSA/NSO or LCRO and Advisory on Marriage issued by PSA/NSO of the member (1 Photocopy); and
  - Birth Certificate issued by PSA/NSO or LCRO or Baptismal Certificate of the child/children (1 Photocopy); or
    - Non-availability of Birth Record issued by PSA/NSO (1 Photocopy) and Joint Affidavit of Two Disinterested Persons (HQP-PFF-029) (1 Original) (*in the absence of the Birth Certificate or Baptismal Certificate*)

#### 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/NSO or LCRO (1 Photocopy)
4. SSS Employment History (*as applicable*) (1 Photocopy)
5. Proof of Surviving Legal Heirs (HQP-PFF-030) (1 Original)
6. To establish kinship with the member, the claimant shall submit the following:
  - Marriage Certificate issued by PSA/NSO or LCRO and Advisory on Marriage issued by PSA/NSO of the member (1 Photocopy); and
  - Birth Certificate issued by PSA/NSO or LCRO or Baptismal Certificate of the member (1 Photocopy); or
    - Non-availability of Birth Record issued by PSA/NSO (1 Photocopy) and Joint Affidavit of Two Disinterested Persons (HQP-PFF-029) (1 Original) (*in the absence of the Birth Certificate or Baptismal Certificate*)



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## MEMBER/CLAIMANT

### 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/NSO or LCRO (1 Photocopy)
4. Proof of Surviving Legal Heirs (HQP-PFF-030) (1 Original)
5. SSS Employment History (*as applicable*) (1 Photocopy)
6. Birth Certificate issued by PSA/NSO or Baptismal Certificate of the deceased member (1 Photocopy)
7. Certificate of No Marriage issued by PSA/NSO (1 Photocopy)
8. Declaration of Guardianship (if the child/children below 18 years old, or of the child/children is/are physically or mentally incompetent) (HQP-PFF-028) (1 Original)
9. To establish kinship with the member, the claimant shall submit any of the following:
  - Birth Certificate issued by PSA/NSO or LCRO or Baptismal Certificate of the child/children (1 Photocopy); or
  - Non-availability of Birth Record issued by PSA/NSO (1 Photocopy) and Joint Affidavit of Two Disinterested Persons (HQP-PFF-029) (1 Original) (*in the absence of the Birth Certificate or Baptismal Certificate*)

### Death Claim - Single (Without child/children 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/NSO or LCRO (1 Photocopy)
4. Proof of Surviving Legal Heirs (HQP-PFF-030) (1 Original)
5. SSS Employment History (*as applicable*) (1 Photocopy)
6. Birth Certificate issued by PSA/NSO or Baptismal Certificate of the deceased member (1 Photocopy)
7. Certificate of No Marriage issued by PSA/NSO (1 Photocopy)
8. To establish kinship with the member, the claimant shall submit any of the following:
  - Birth Certificate issued by PSA/NSO or LCRO or Baptismal Certificate of the member (1 Photocopy); or
  - Non-availability of Birth Record issued by PSA/NSO (1 Photocopy) and Joint Affidavit of Two Disinterested Persons (HQP-PFF-029) (1 Original) (*in the absence of the Birth Certificate or Baptismal Certificate*)

### 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 or its equivalent (1 Photocopy)
4. Declaration of Intention to Depart from the Philippines Permanently (HQP-PFF-031) (1 Original) (No need to submit if already based abroad)
5. SSS Employment History (*as applicable*) (1 Photocopy)

### 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)/Alien Certificate of Registration issued by the Bureau of Immigration or its equivalent (1 Photocopy)
4. SSS Employment History (*as applicable*) (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. The SSS Employment History shall only be required for members with multiple private employers.
2. 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)/National Statistics Office (NSO) or Local Civil Registry Office (LCRO) or Baptismal Certificate
  - Non-availability of Birth Record issued by PSA/NSO and Joint Affidavit of Two Disinterested Persons
3. 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 in AFP) or Service Record (For Members under PNP, BJMP, BFP) is required.*
4. 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 apostillized 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.*
5. For member/claimant who wish to receive the claim proceeds through Payroll Account Card/Disbursement Card, the card/deposit slip shall be presented for authentication.
6. The member/claimant may also be required to present a proof (*i.e., recent balance inquiry slip*) to avoid unsuccessful crediting of claim proceeds due to dormant or closed account and to ensure that the account is still active.
7. 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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