

**CHECKLIST OF REQUIREMENTS**  
**TERMINATION OF MEMBERSHIP – DECEASED MEMBER**  
(Original Documents with Dry Seal or Authenticated)

<div>Deceased Member's Name and Member No.</div>	
<div>Claimant's Name &amp; Relationship to the Deceased Member</div>	<div>Contact Number</div>

**Basic Requirements:**

**Total Account Balance – above Php50,000.00 (Capcon/CASA/PSA others as applicable)**  
(All surviving legitimate heirs of the deceased member, whether married or single, shall be entitled to the proceeds according to the rules on intestate succession.)

- |  |           |
|--|-----------|
| 1. Accomplished Termination Form   | (       ) |
| 2. PSA-issued or Certified True Copy of Death Certificate, or Foreign Death Certificate (if member died abroad)          | (       ) |
| 3. Proof of Relationship of all claimants/heirs to the deceased member   |           |
| a. PSA-issued Marriage Certificate (if claimant is spouse);  | (       ) |
| b. PSA-issued Birth Certificate (if claimant is child);  | (       ) |
| c. PSA-issued Birth Certificate and CENOMAR of deceased member (if died single and claimants are the surviving parent/s) | (       ) |
| 4. Photocopy of 1 valid ID w/ 3 specimen signatures (of all claimant/s of legal age)                                     | (       ) |
| 5. Quitclaim (form from PSSLA, to be notarized by the claimant)  | (       ) |
| 6. Deed of Extrajudicial Settlement of Estate or Affidavit of Self Adjudication, whichever applies                       | (       ) |
| 7. PSSLA ID and Passbook/s (if lost, submit a notarized Affidavit of Loss)   | (       ) |
| 8. BIR Form 1904 or 2313-P   | (       ) |

**Additional Requirements (as applicable):**

- |   |           |
|---|-----------|
| 1. Affidavit of Legal Guardianship (if there are minor and/or mentally incapacitated claimants)   | (       ) |
| 2. Waiver of Rights to Claim (if not all claimants are present during the release of the claim)   | (       ) |
| 3. Duly notarized or consularized/apostilled (if heir/s reside abroad) Special Power of Attorney (SPA) if the transaction is through an authorized representative | (       ) |
| 4. For deceased members with existing loans and/or free burial benefit coverage: documents that may be required by the insurance provider.                        |           |

\*\* The Association may require additional documents as it deems necessary.

\*\* If there is **SURVIVORSHIP AGREEMENT**, submit **ONLY** the ff:

- |   |           |
|---|-----------|
| 1. Accomplished Termination Form  | (       ) |
| 2. PSA-issued or Certified True Copy of Death Certificate, or Foreign Death Certificate (if member died abroad) | (       ) |
| 3. Quitclaim (form from PSSLA, to be notarized by the claimant)   | (       ) |
| 4. PSSLA ID and Passbook/s (if lost, submit a notarized Affidavit of Loss)                                      | (       ) |
| 5. BIR Form 1904 or 2313-P  | (       ) |

<div>Received by:</div>	<div>Checked by:</div>	<div>Approved by:</div>
<div></div>	<div></div>	<div></div>

**NOTE:** BIR Estate Tax Clearance Requirement:

- Member's date of death is from January 1, 2018 and onwards:
- a. If filed within 1 year from the date of death, submit any of the following:
    - BIR Form 1904 of the estate of the deceased member duly stamped by the concerned BIR Revenue District Office (RDO) – the claim shall be subject to 6% final withholding tax; OR
    - BIR Tax Clearance (Form 2313-P)
  - b. If filed more than 1 year from the date of death, submit the BIR Tax Clearance (Form 2313-P)
- Member's date of death is prior to January 1, 2018:
- a. If the total claim amount exceeds Php20,000.00, submit the BIR Tax Clearance (Form 2313-P);
  - b. If the total claim amount does not exceed Php20,000.00, the claim may be released.