

The Co-operators Group Limited or one of its subsidiary companies (collectively, "The Co-operators") may be in possession of unclaimed property. If you believe that we have unclaimed property that belongs to you and would like to make a request to search The Co-operators' unclaimed property database, please complete the following form.

**\*Required Information****Name***\*FIRST NAME:**\*LAST NAME:**DATE OF BIRTH (\*IF POLICYHOLDER):***Address***\*STREET NAME AND NUMBER:**\*COUNTRY:**\*CITY:**\*PROVINCE AND POSTAL CODE:**TELEPHONE NUMBER:**\*EMAIL ADDRESS:***Relationship to policyholder***\*RELATIONSHIP:***Type of search required***\*UNCLAIMED PROPERTY TYPE:**\*INSURANCE TYPE:***Company Information***\*PLEASE SELECT THE APPLICABLE UNDERWRITING COMPANY:***Advisor Information***\*IF THE POLICY WAS PLACED DIRECTLY WITH A LOCAL ADVISOR OFFICE, PLEASE PROVIDE THEIR CONTACT INFORMATION**(NAME, ADDRESS, CITY, PHONE NUMBER, EMAIL ADDRESS):**NOTE: IF THE POLICY WAS RELATED TO GROUP AUTO & HOME INSURANCE, OR WAS PLACED THROUGH A CALL CENTRE, INDICATE AS "CALL CENTRE/OTHER" AND PROVIDE ADDITIONAL DETAILS***About the policy***POLICY/CLAIM NUMBER(S) RELATING TO THE UNCLAIMED PROPERTY (IF KNOWN):**UNCLAIMED PROPERTY AMOUNT (IF KNOWN):*

## Additional Details/Comments

*\*PLEASE PROVIDE ANY ADDITIONAL DETAILS THAT MAY ASSIST US IN OUR SEARCH, SUCH AS INFORMATION ON THE PERSON YOU ARE ACTING ON BEHALF OF (NAME, DATE OF BIRTH), ALL PREVIOUSLY KNOWN ADDRESSES, PHONE NUMBERS OR EMAIL ACCOUNTS THAT MAY HAVE BEEN ASSOCIATED WITH THE RELEVANT POLICY, AND THE POLICY INCEPTION AND EXPIRATION DATES:*

In addition to the above personal information that is collected to assist in the search and validation of your claim to unclaimed property, we require the following in order to confirm your identity and, where applicable, establish your authorization to act on behalf of others:

- ***\*If you are making claim on your own behalf:*** two pieces of identification, at least one of which is photo ID. Such documentation must establish name, signature, date of birth, and proof of current address
- ***\*If you are acting on behalf of an estate of a policyholder:*** one piece of photo identification to establish name, signature, date of birth and proof of current address, and a notarized copy of the letters probate or letters of administration demonstrating your entitlement to act on behalf of the estate. If such letters do not exist, a sworn affidavit that you are entitled to act on behalf of the estate, accompanied by a copy of the death certificate and a letter from the estate's lawyer indicating that the lawyer has concluded that you are authorized to act on the estate's behalf will be required.
- ***\*If you are acting on behalf of the claimant:*** one piece of photo identification to establish name, signature, date of birth and proof of current address along with a copy of a power of attorney or sworn affidavit advising that you have legal authority to act on behalf of the claimant
- Any other supporting documents demonstrating entitlement to the property, such as expired policy documents, general correspondence, or stale dated cheques, that may be useful in confirming and expediting your claim

### ***Privacy Disclaimer:***

***All information which you provide will be used by The Co-operators to verify your identity, to validate your claim and to facilitate the disbursement of the unclaimed property. By submitting this form, you are consenting, on your own behalf, and on behalf of any other individuals whose personal information you have provided, to The Co-operators' collection, use, and disclosure of the personal information provided by you for the purposes of verifying your identity, validating your claim, or the claim of the estate or other individual whom you represent, to ownership of the unclaimed property in question, and facilitating the disbursement of the unclaimed property in question.***

## Records retention guidelines

We retain client records in compliance with our internal Records & Retention Policy, in addition to the guidelines outlined in various provincial Unclaimed Property Acts. If your claim relates to property that has been unclaimed for a period that exceeds our Internal Records Retention Policy, it may be difficult for us to verify your details and/or process your claim.

As outlined under provincial Unclaimed Property Acts record retention guidelines, records sufficient for the purposes of locating and notifying owners and of determining the validity of claims relating to any unclaimed property will be retained for the following period after the money no longer becomes unclaimed:

For residents of Quebec:

- A period of no less than 10 years

For all other residents of Canadian provinces and territories, and foreign countries:

- 6 years, if the amount of the claim is under \$1,000
- 10 years, if the amount of the claim is at least \$1,000 but is under \$25,000
- 30 years, if the amount of the claim is \$25,000 or more

**Please submit this completed form along with all supporting documentation to request a search for unclaimed property** to [compliance@cooperators.ca](mailto:compliance@cooperators.ca). For inquiries relating to unclaimed funds that were payable within the past 12 months but not received, or have become stale dated, please reach out to your local Co-operators advisor office directly or call 1-877-545-2667 if it is in relation to a property and casualty product (Auto, Home, Commercial), 1-800-454-8061 if it pertains to a Life product, or 1-877-682-5246 if it pertains to a claim's related reimbursement (in Quebec, call 1-877-594-2667).

After receiving your request, a representative will contact you within 10 business days. Failure to provide the necessary information may result in your search request being delayed or denied.