Payout Request Form

Please read all instructions before signing the form

- · Kindly Fill all details in BLOCK LETTERS only
- For unit-linked products, if the request is received and accepted at the Company's office before 3 p.m., unit price declared on the same date will be applicable, and if the request is submitted and accepted at the Company's office after 3 p.m., The next working day's Unit price declared will be applicable
- If the policy has been assigned, the request would be accepted on receipt of letter from the Assignee of the policy
- · All communication will be sent to the address recorded with us
- Please do collect the acknowledgement number as this will be your reference for all future communications on this request
- The application for any withdrawal needs to be submitted along with requisite documents as mentioned in the form

Policy Details
Kindly Fill in BLOCK LETTERS only
Policy Number.
Name of Policyholder. First Name Middle Name Last Name
Are you a US Citizen or US tax resident Yes No If Yes, Please provide TIN:
Policyholder Contact Details
Landline No. (Residence) 0 - - *Mobile No.: (Mandatory) 0 - <
STD Phone Pre-Issuance Cancellation
Proposal Application Number.
Reason for Pre-issuance cancellation:
Freelook
Freelook Option executed for. Change in Policy Feature/Product Change, fresh proposal form Is required to be submitted
Reason for Freelook cancellation:
Documents Submitted 🗌 Welcome Kit*
Change in policy feature:
Partial Withdrawal
` `
Name of fund(s) to be withdrawn Percentage/Amount
Note: Request will be processed if withdrawal requested is greater than or equal to minimum amount mentioned in the policy document. Partial withdrawal no allowed in case of pension products. If the fund names are not mentioned above, the partial withdrawal amount will be deducted in the current fund ratio.Plea note that in case "Maximum eligibility" is selected, the policy fund value will reach to minimum account value that needs to be kept in the policy, which will result in surrender of policy & payout will be processed, as per policy feature, Please refer policy bonds for details,
Surrender
Documents Submitted: 🗌 Welcome Kit* 🔲 Pan Card

*Mandatory:

1) Amount payable on surrender of the units is as per the terms & conditions. The surrender of the units results in termination of the contract and all the rights/title and interest under the policy shall stand extinguished. If the policy is surrendered before the completion of the lock-in period then the surrender value calculated as at the date the request of such surrender by the Policyholder, shall be frozen and become payable after the completion of the lock in period. For lock-in period details please refer your policy bond.

2) As per the new provisions introduced by the Finance Act, 2014 life insurance companies need to deduct tax at source (TDS) Q2% from the payments made on

or after 1* October 2014 under any life insurance policy if such payouts are not exempt from tax. Further provided that if PAN is not submitted by the payee then

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