



Important instructions for completing the form

- ▶ All fields under "Personal Details" and "Bank Account Details" section are mandatory.
- ▶ Update information only in sections where you wish to change or update any detail.

Personal Details

Policy No

Policyholder Name

Email

Mobile No PAN

Bank Account Details

Filling bank details are mandatory as the details are required to process the payouts. To update fill out below details and provide cancelled cheque along with ID proof (Annexure-1)

Bank Name

Account Type Savings Current NRE NRO NFC

Account No IFSC Code

* I give my consent to Bandhan Life Insurance to consider the above-mentioned details as the latest ones and update them in the system for all my policies.

Please process my payout, for the above-mentioned policy, as

Freelook Surrender Partial Withdrawal Systematic Partial Withdrawal

I am aware of the applicable cancellation charges as per the standard terms and conditions mentioned in the policy document which I have received.

Please cancel my Policy as

Specify the reasons

I want to avail a **Partial Withdrawal Amount**. Applicable for ULIP. (Tick the relevant box)

Minimum partial withdrawal amount applicable as per terms and conditions

Maximum partial withdrawal available for the policy (% of the fund value at the beginning of that policy year as per terms & conditions)

Other Amount ₹

OR

I want to avail a **Systematic Partial Withdrawal Amount**. Applicable for ULIP. (Tick the relevant box)

Minimum partial withdrawal amount applicable as per terms and conditions (Subject to min. of ₹2000)

Maximum partial withdrawal available for the policy (% of the fund value at the beginning of that policy year as per terms & conditions)

Other Amount ₹



Please note

- 1) In case the Partial/Systematic Partial Withdrawal amount availed by you (option: Other Amount) is not eligible for processing, then the maximum eligible Partial/Systematic Partial Withdrawal amount (if any) for the said policy will be paid to you.
- 2) In case wherein the policy is assigned, if the Partial/Systematic Partial Withdrawal amount is to be paid to the assignor, then consent of the assignee is mandatory and has to be submitted along with this endorsement form.
- 3) If the Fund Value or Surrender Value of the policy falls below the minimum value specified in the policy terms and conditions, policy will be terminated and the Surrender/Fund Value, if any, will be paid. The partial withdrawal under the policy will reduce the Fund Value.

Non-Resident Indian Questionnaire (To be filled in by the Proposer)

Resident Details

Your Country of Permanent Residence

Date from which you have become a permanent resident of the country mentioned above

Residential Status

Permanent Account Number under Income Tax Act,1961 of India, if any

Your full address while abroad

Documentation for NRI

I have enclosed the list of documents to this effect. (*Mandatory) Copy of

- Passport (Proof of country of residence)
- TRC – Tax Residency Certificate obtained from jurisdictional tax office of the non-resident policyholder from a country outside India
- Declaration from the policyholder with respect to his/her residential status and country of residence Address
- Indian as well as foreign
- Bank name, branch name & address

Please note

- 1) All the above documents/details should be in the name of recipient of payment under life insurance policy. It may be proposer, life insured, or beneficiary.
- 2) In case of non-availability of PAN, the TDS rate will be applicable as per tax laws. Hence, providing a PAN copy will be beneficial for the customer.
- 3) Processing a payment to a non-resident will take 6-7 working days from the date of receipt of all requisite information. Hence, the policy holder needs to be intimated about the timelines for the provision of documents within timelines.

Are you Politically Exposed Person?

Yes No

FATCA details

Select your current residential status

Indian NRI

Please note: For NRI, TDS deduction, if any, is subject to RBI regulation based on residential status



Loan Request

To be filled if you want to apply for loan

I want to avail a Loan amount (Tick the relevant Box)

- Minimum loan amount applicable as per product
- Maximum loan amount available for the policy (*Surrender value as per terms and conditions)
- Amount ₹

Please note

- 1) Applicable interest rate will be charged for availing the above mentioned loan amount. If at any point of time, the outstanding loan amount plus interest exceeds the surrender value, the policy will terminate without acquiring any value.
- 2) In case the loan amount availed by you (Option: Value) is not eligible for processing a loan request, then the maximum eligible loan amount (if any) for the said policy will be paid to you.
- 3) Loan is not available for the assigned policy.

Declaration & Authorization for Loan request

- 1) No request shall be deemed to be treated valid and effective unless received by Bandhan Life Insurance Limited, (Hereinafter referred to as "the Company"), during the lifetime of the Insured and is finally accepted by the Company. The receipt of this form by the agent does not constitute receipt/acknowledgment by the Company.
- 2) I/We hereby request that the terms and conditions of this policy be changed in accordance with the above particulars with the understanding and agreement that a copy of this request shall be attached to and forms a part of the said policy.
- 3) I/We understand that (i) the Company may be unable to process this application if I/We fail to provide any further information requested by the Company and (ii) I/We have the right to obtain access to and to request correction of any personal information held by the Company concerning me/us.
- 4) I/We hereby declare that the information given above are correct and complete and shall inform you of changes if any. The Company shall not be responsible for delay in credit, amount not credited, amount credit to incorrect account, due to incomplete or incorrect information herein.
- 5) I/we understand that the information provided by me/us may be shared with third parties as per legal or regulatory requirements.
- 6) I/We hereby undertake to indemnify the company for any loss post assignment that is may sustain for: a. The wrongful usage of policy document or b. Creation of any third party interest affecting the right of the Company.

Notice of Assignment: I, _____, the Assignor, hereby give you notice that I have assigned the above Policy to the Company (Assignee name) and Assigns all monies, benefits and advantages to be received to the extent of loan against the policy.

Signature of Policyholder

Date

Place _____

Declaration & Authorization

I, _____, being the Policy owner herein declare & affirm that the details provided in the request form are true and correct, while the present request shall be processed only after all the information/documents, as required by the Insurance Company, stand submitted and received by the Company.

I/We hereby request that the terms and conditions of this policy be changed in accordance with the above particulars with the understanding and agreement that a copy of this request shall be attached to and forms a part of the said policy.

I consent and agree to indemnify Bandhan Life Insurance Limited (Insurance Company) in case any wrongful/incorrect policy benefit is received by me.



Disclaimer

- 1) In accordance with IRDAI guidelines, if the valid application is received upto 3 pm, the same day closing NAV shall be applicable and if received after 3 pm, the closing NAV of the next business day shall be applicable.
- 2) In the event of any disagreement in interpreting the contents of the format, the format that was printed in Hindi/English version (as the case may be) prevails as per IRDAI Circular No: IRDAI/ Life/ Life Council/ 2013/ 73 dated 29th April, 2014
- 3) The Company will not be responsible for any delay or non-credit due to incorrect banking details
- 4) The payout settlement is subject to receipt of complete documentation and successful verifications. Additional requirements may be called for and you may receive a call for verification of facts prior to the settlement
- 5) Freelook period: I also understand that the refund amount (provided the Free Look has been enforced by me within the stipulated timeline) will be after deduction of applicable charges

Signature of Policyholder/Nominee/Assignee

Date

Place

Vernacular Declaration

To be submitted if the form is signed in any language other than English or bears the thumb impression of the Policyholder/ Assignor.

I hereby declare and certify that I have explained the content of this form to the Policyholder/Assignor in the language understood by him/her and that the Policyholder/Assignor has affixed his/her thumb impression/ signature on this form in my presence, after fully understanding the content thereof.

Name of the Declarant

Contact No

Signature of the Declarant

Date

Place



Annexure – 1

List of KYC Proof		
OVDs	ID Proof	Address Proof
Valid Passport	Yes	Yes
Valid Driving License	Yes	Yes
PAN Card	Yes	No
Aadhar card/ Proof of Possession of Aadhaar card	Yes	Yes
Voter's identity card issued by Election Commission of India	Yes	Yes
The letter issued by the National Population Register containing details of name, address, etc.	No	Yes
Job card issued by NREGA duly signed by an officer of the State Government	Yes	Yes
Any other document as notified by the Central Government in consultation with the Regulator	Yes	Yes

Please note: All documents submitted need to be self-attested by the Policy owner. Where Aadhaar/proof of possession of Aadhaar containing Aadhaar Number is voluntarily provided, the customer shall redact or black out first 8 digits of Aadhaar number.

**Bandhan
Life**

Bharat Ki Udaan, Bandhan Se.

Chat with ALIA
on our websiteWe are now
on **Whatsapp**Manage your
policy on **iAssist**Our Tollfree No.
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