



**Premium-Redirection**

I would like to request that my FUTURE premiums for the above policy number be invested in the proportion as mentioned below

Percentage (Total=100%)	Name of desired fund

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

**Declaration & Authorization**

- 1) I confirm having read all the relevant policy provisions before making this application and having understood them and their consequences. I further confirm that the premium paid above is derived out of legitimate sources of funds. I understand and agree that all the instructions are authorized by me through this form are made under my consent and are not provided under any duress or compulsion and has agreed to carry out the same on my behalf. I undertake not to raise any action or claim whatsoever against Bandhan Life for any reason thereto.
- 2) I hereby declare that I have understood the meaning and scope of this form and Fees/charges applicable for Switches & Redirection stated in General Provisions forming part of the Policy Document. I agree to all the conditions specified hereinabove and the Policy Document.
- 3) I hereby agree and confirm that the above details provided by me are true and correct. I request you to update above information in your records. I hereby provide my consent to receive call from Bandhan life insurance ltd or its authorized Service Providers in connection with any matter related to my above Policy.

**Disclaimers****General**

- 1) For customers registered under National Do Not Call Registry, this will be considered as consent to communicate with him/her on the contact details provided herein.
- 2) Policyholder/Payor's ID & Address proof along with PAN card to be submitted.
- 3) In case Policyholder/Payor does not have PAN Card the please submit Form 60/61.

**Top Up**

- 1) Cheque / DD should be drawn on bank's local branch in favour of XXX
- 2) The NAV for the excess top up premium remitted for which there is an increased sum assured, would be given as on the final underwriting date on which the decision to issue the top up sum assured is approved
- 3) If a Fund Switch & Top Up request are received together, Fund Switch transaction will be processed first
- 4) Redirection is not applicable to single premium plans. Please check your plan for the same
- 5) Your premiums will be allocated as per original fund allocation unless a Premium Redirection request is raised
- 6) The Company reserves the right to alter the charges without prior intimation
- 7) Policy servicing charges may be levied as applicable. Please refer to your policy document for details
- 8) To process your fund switch request, we will first cancel all of the existing units in your policy fund(s). The proceeds from the cancelled units, after deducting the applicable charge (if any), will then be used to buy units in your chosen Fund(s)
- 9) Source of funds require if Top up amount exceeds ₹1 Lakh

**Fund Switch**

Fund Switch will be applicable to existing funds only and not to future premium allocations

**Premium Redirection**

Change of allocations will apply to future premium only and shall not apply for existing funds.

I confirm having read and understood all the relevant policy provisions before making this service request.

Signature of Policyholder

Signature of Assignee  
(In case policy is assigned)

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.



Annexure – 2

List of accepted Income Proof

**a. Salaried**

- Last 3 months salary slip, or
- Last 3 months bank statement

**b. Non-Salaried**

- Last 3 months bank statement, or
- Last FY ITR report



**Bandhan  
Life**

**Bharat Ki Udaan, Bandhan Se.**



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Our Tollfree No.  
**1800-209-9090**



**Mail us**  
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