BAJAJ LIFE

LIFE GOALS. DONE.

Policy Servicing Request Form

This is a system generated form and does not mean acknowledgement/receipt for the service request. Customers are requested to obtain an acknowledgement on the submission of this form.

INSTRUCTIONS FOR FILLING UP THE FORM:-

1. This form is to be filled by the Policy Holder himself/herself in BLOCK LETTERS in **Blue Ink**.
2. Please tick a box thus ☑ where appropriate.
3. Please strike out parts, which are not applicable and write 'N.A.'. Strokes of the pen, dots and dashes will not be accepted as replies.
4. Form filling person must affix his/her signature for any cancellation/correction/alteration.
5. Form filling person must affix his/her signature on each page / side of the form.

DOCUMENTS REQUIRED

1. KYC documents of Policy Holder, Assignee & Declarant.

Policy Number _____ Date _____

Life Assured's Name _____

Policy Holder's Name _____

Contact No. (Mobile) _____ Contact No. (Tel) _____

Email _____ PAN Number _____

In compliance of the provisions relating to deduction of tax at source under section 194 DA of Income Tax Act, 1961 as introduced by Finance Act, 2014, any payment (except payment exempted u/s 194DA) made by Bajaj Life Insurance Limited shall be subject to deduction of applicable TDS. In absence of PAN details, TDS would be deducted @ 20% instead of 1% in case where PAN is provided. TDS once deducted shall not be refunded Please update your PAN immediately. Kindly ignore if PAN details already provided. For further details, please consult your Income Tax advisor/consultant.

Change of Contact Details of policy holder / Insured Person / Assignee

☐ Policy Holder ☐ Insured Person ☐ Assignee

ADDRESS

Old Details		**New Details**	
Door No	Building Name	Door No	Building Name
Plot No./ Street Name		Plot No./ Street Name	
Landmark/ Area		Landmark/ Area	
Place		Place	
City/District		City/District	
State	Pin Code	State	Pin Code
Tel.		Tel.	
Mobile		Mobile	
Email		Email	

Other Alterations

		Existing Details	New Details
☐	Name correction		
☐	Date of birth (DOB) correction		
☐	Frequency change		
☐	Change of Package		
☐	Change in Payment Method		
☐	Premium Increase / Decrease		

■ Addition/Deletion of Rider

Name of Rider for Addition/Deletion: ..... Effective From.....

Note: Any addition of rider is subject to the company underwriting the risk and the company shall not be liable until such time it has underwritten the risk and issued intimation to the policy holder and any addition of rider for a traditional policy will be effective from next policy anniversary.

■ Change in Sum Assured

I wish to increase/ Decrease Sum Assured from..... to ..... Note: Increase in SA is subject to Policy Condition

- Increase of SA is subject to the company underwriting the risk and the company shall not be liable until such time it has underwritten the risk and issued intimation to the policy holder.

Change in Fund Apportionment(Allocation of Future Premiums)*

I wish allocate my future premiums as indicated:

Note:

- The allocation totals to 100%
- Fund Apportionment doesn't guarantees fund switching.
- Please refer Fund SFIN No. below

NAME OF THE FUNDS	PERCENTAGE %

Fund Switch (Allocation of Existing Funds)*

I wish to switch the value of units credited to this policy as indicate below:

From Fund	To Fund	No. Of units	Amount (`)

Note:

- This Fund Switching transaction would be applicable to the existing funds, and the future premiums shall continue to be apportioned in the same proportion, as it exists today
- The selected fund is applicable for the particular product
- Switching charges would be levied as per policy condition
- Please refer Fund SFIN no. below

Top- Up

Top-Up Amount :

Top-Up Sum Assured :

NAME OF THE FUNDS	PERCENTAGE %

Note :

- Minimum amount of Top-Up is ₹ 5000/-
- Max Amount is governed by respective policy conditions
- Please refer Fund SFIN No. below
- If the application for fund switch/ allocation is received up to 3 pm on a weekday (Mon- Fri), the same day's unit value will be applicable. However, if the application is received after 3pm on a weekday, then the next working day's unit value will be applicable. (When the applicable day is not a valuation day, NAV of the next immediate valuation day would be considered)

Declaration: I/We hereby request the policy particulars be changed in accordance with the above information furnished by me/us. Further I/We agree that company may not be able to process the request if I/We provide any incorrect/incomplete/inconsistent information.

Date:_____ Place: _____

_____
Thumb Impression/ Signature of the Policy Holder / Assignee

Declaration In Case

i) This Application Form is filled by a Person other than the Life Assured

Or/And

ii) Life Assured has either put thumb Impression or signed in Vernacular

Declaration by Life Assured:

I hereby declare that the content and purport of this form have been fully explained to me by _____ (Name of person filling the form) in the language understood by me and I declare that whatever has been stated hereinabove has been recorded by _____ (Name of person filling the form12) as per information provided by me.

Date :_____

Place :_____

_____
Thumb Impression/Signature of the Policy Holder / Assignee

Declaration by person filling the form:

I have explained the contents of this form to the Life Assured in _____ language and I have correctly recorded the answers provided to me.

I, further, declare that the Life Assured has signed/affixed his/her thumb impression in my presence.

Name :_____

Address: _____

_____

Contact: _____

Date: _____

_____
Declarant's Signature
(Declarant should sign in English Language only)

SFIN & Fund Names

EQUITY FUND: ULIF00315/01/04EQUITYFUND116, DEBT FUND: ULIF00415/01/04DEBTFUNDLI116, BALANCED FUND: ULIF00115/01/04BALANCEFUN116, CASH FUND: ULIFOO215/01/04CASHFUNDLI116, EQUITY GAIN FUND:ULIFO0523/07/04EQGAINFUND116, EQUITY INDEXFUND: ULIF00623/07/04EQINDEFUND116, EQUITY PLUS FUND: ULIF00723/07/04EQPLUSFUND116, BALANCED PLUS FUND: ULIF00823/07/04BALANCPLUS116, DEBT PLUS FUND: ULIF00923/07/04DEBTPLUSFU116, CASH PLUS FUND: ULIFO1023/07/04CASHPLUSFU116, LIFELONG GAIN : ULIF01123/07/04LIFELOGAIN116, EQUITY PLUS PENSION : ULIFO1218/11/04EQUPLUSPEN116, EQUITY INDEX PENSION : ULIF01318/11/04EQINDEXPEN116, BALANCE PLUS PENSION : ULIF01418/11/04BALPLUSPEN116, DEBT PLUS PENSION :ULIFO1518/11/04DEBTPLUPEN116, CASH PLUS PENSION:ULIFO1618/11/04CASHPLUPEN116, EQUITY MIDCAP FUND: ULIFO1709/03/05EQUMIDFUND116, EQUITY MIDCAP PLUS: ULIFO1809/03/05EQUMIDPLUS116, EQUITY MIDCAP PENSION : ULIFO1909/03/05EQUMIDCPEN116,PURE EQ FUND: ULIFO2017/12/05PUREEQFUND116, PREMIER EQUITY FUND: ULIFO2117/12/05PRMREQFUND116, PREMIER EQ GAIN FUND: ULIFO2217/12/05PREREQGAIN116, PREMIER DEBT FUND:ULIFO2317/12/05PRERDEBTFU116, PREMIER BAL FUND:ULIF02417/12/05PRERBALFUN116, LIQUID FUND: ULIF02510/07/06LIQUIDFUND116, BOND FUND: ULIF02610/07/06BONDFUNDLI116, EQUITY GROWTH FUND:ULIFO2924/07/06EQGROWFUND116, EQUITY INDEX FUND II: ULIF03024/07/06EQTYINDX02116, ACCELERATOR MIDCAP FUND : ULIF03124/07/06ACCEMIDCAP116, BALANCER FUND : ULIFO3224/07/06BALANCERFU116, PURE STOCK FUND : ULIFO2721/07/06PURESTKFUN116, PREMIER BOND FUND : ULIFO2821/07/06PREMIRBOND116, PREMIER EQUITY GROWTH :ULIFO3824/07/06PREMEQGROW116, PREMIER EQUITY INDEX FUND :ULIF03924/07/06PREREQINDX116, PREMIER BALANCER FUND : ULIFO4024/07/06PREMRBALFU116, LIQIUD PENSION FUND : ULIF04124/07/06LIQPENFUND116, BOND PENSION FUND :ULIFO3524/07/06BONDPENFUN116,EQUITY GROWTH PENSION FUND: ULIFO3624/07/06EQTYGROPEN116, EQUITY INDEX PENSION FUND II: ULIF03724/07/06EQINDPENO2116, ACCELERATOR M-C PENSION FUND: ULIF03324/07/06ACCEMIDPEN116, BALANCER PENSION FUND:ULIF03424/07/06BALAPENFUN116, CAPITAL GUARANTEE FUND 2014: ULIF04211/01/07CAPGTE2014116, CAPITAL GUARANTEE FUND-2017: ULIF04311/01/07CAPGTE2017116, CAPITAL GUARANTEE FUND-2012: ULIF04411/01/07CAPGTE2012116, ASSET ALLOCATION FUND: ULIF04528/09/07ASSETALLOC116, ASSET ALLOCATION PENSION FUND : ULIF04628/01/08ASALLOCPEN116, PURE STOCK PENSION FUND :ULIF04717/04/08PURESTKPEN116, CAPITAL SHIELD - 2 : ULIFO4824/11/08CAPSHIELO2116, CAPITAL SHIELD - 1: ULIF04924/11/08CAPSHIEL01116, EQUITY GROWTH FUND-2:ULIFO5106/01/10EQTYGROW02116,ACCELERATOR MID CAP FUND-2: ULIF05206/01/10ACCMIDCA02116, MAX GAIN FUND 1: ULIF05017/12/09MAXGAINF01116, SHIELD PLUS FUND-1:ULIF05313/01/10SHIELDPL01116, GROWTH PLUS FUND-1 :ULIF05414/01/10GROWPLUS01116, GROUP EQUITY INDEX FUND: ULGF00822/02/10GREQTYINDX116, GROUP ASSET ALLOCATION FUND:ULGF00926/02/10GRASSALLOC116, GROUP DEBT FUND:ULGF00426/03/08GRDEBTFUND116, GROUP SHORT TERM DEBT FUND : ULGF00628/02/09GRSHTRMDEB116, GROUP LIQUID FUND ULGF00503/11/08GRLIQUFUND116, ACCELERATED FUND :ULGF00318/11/04ACCELEFUND116, STABLE FUND : ULGF00115/09/04STABLEFUND116, SECURE FUND: ULGF00215/10/04SECUREFUND116, GROUP GROWTH FUND 1: ULGF00707/07/09GRGROWFU01116, GROWTH PLUSFUND II: ULIF05510/05/10GROWPLUS02116, SHIELD PLUS FUND II: ULIF05610/05/10SHIELDPL02116, SHIELD PLUS FUND III: ULIF05711/08/10SHIELDPL03116, MAX GAIN FUND II: ULIF05814/09/10MAXGAINFO2116, BLUECHIP EQUITY FUND: ULIF06026/10/10BLUECHIPEQ116, GROWTH PLUS FUND III: ULIF05926/10/10GROWPLUS03116, ASSURED RETURN FUND: ULIF06127/01/11ASSRDRETRN116, GROUP EQUITY FUND:ULGF01018/04/11 GREQTYFUND116, GROUP BLUE CHIP FUND: ULGF01118/04/11GRBLUECHIP116, GROUP SHORT TERM DEBT FUND II: ULGF01218/04/11GRSHTRDE0211, SHIELD PLUS FUND IV: ULIF06220/04/11SHIELDPL04116, GROUP GROWTH FUND II: ULGF01311/05/11 GRGROWFU02116, GROUP RETURN SHEILD FUND: ULGF01421/06/11RETNSHIELD116, GUARANTEED BOND FUND:ULIF06322/09/11GTEBONDFND116