

CUSTOMER INFORMATION SHEET / KNOW YOUR POLICY

This document provides key information about your policy. You are also advised to go through your policy document. We request you to kindly review the CIS and acknowledge the same through a link shared to you on your registered mobile number/Email ID/WhatsApp.

Sl. no.	Title	Description in Simple Words (Please refer to applicable Policy Clause Number in next column)	Policy Clause Number
1.	Name of the Insurance Product and Unique Identification Number (UIN)	Bajaj Life Assured Wealth Goal Platinum (UIN - 116N188V06)	Policy Schedule
2.	Policy Number	<xxxxxx>	
3.	Type of Insurance Policy	Non-Linked other than pure risk and pension	Policy Schedule
4.	Basic Policy detail	<ul style="list-style-type: none"> • Instalment Premium (₹) - <xxxxxx> • Mode of premium payment - <xxxxxx> • Sum Assured on Death (₹) - <xxxxxx> • Early Guaranteed Payout (EGP) Start Year - <xxxxxx> • First Early Guaranteed Payout (EGP) (₹) - <xxxxxx> • Subsequent Early Guaranteed Payout (₹) - <xxxxxx> • Maturity Benefit: <ul style="list-style-type: none"> ○ Regular Guaranteed Payout (RGP) (₹) - <xxxxxx> ○ Regular Guaranteed Payout Frequency - <xxxxxx> ○ Enhanced Return of Premium (ROP) (₹) - <xxxxxx> • Premium payment Term (years) - <xxxxxx> • Policy Term (years) - <xxxxxx> • Income Period (years) - <xxxxxx> 	Policy Schedule
5.	Policy Coverage / benefits payable	<ul style="list-style-type: none"> • Benefits payable on maturity – The Maturity Benefit shall be the series of RGPs and Enhanced ROP plus Accumulated Guaranteed Payout (AGP), if any. • Benefits payable on Death – Sum Assured on Death Plus Accumulated Guaranteed Payout (AGP), if any. 	Part C – Section 4 Part C – Section 4

		<ul style="list-style-type: none">• Survival Benefits excluding that payable on maturity – EGP shall be payable in advance starting from EGP Start Year chosen to the end of the Policy Term..• Surrender Value –<ul style="list-style-type: none">○ The Policy can be surrendered at any time after completion of at least the first Policy Year, provided at least one (1) full Policy Years' Premium has been paid○ Higher of Guaranteed Surrender Value (GSV) or Special Surrender Value (SSV); plus Accumulated Guaranteed Payout (AGP), if any.• Options to policyholders for availing benefits, if any, covered under the policy – Not applicable• Other benefits/options payable, specific to the policy, if any – Not applicable• Lock-in period for Linked Insurance product – Not applicable	Part C – Section 4 Part D – Section 8						
6.	Options available (in case of Linked Insurance Products)	Not applicable	Not applicable						
7.	Option available (in case of Annuity product)	Not applicable	Not applicable						
8.	Riders opted, if any	<p>If no riders are opted << Not Applicable>></p> <p>If riders are opted <<</p> <table><tr><td>Rider Name</td><td>UIN</td><td>Sum Assured</td></tr><tr><td><Rider Name></td><td><XX></td><td><XX></td></tr></table> <p>For details on the rider, please refer the customer information sheet of the respective rider. >></p>	Rider Name	UIN	Sum Assured	<Rider Name>	<XX>	<XX>	Policy Schedule
Rider Name	UIN	Sum Assured							
<Rider Name>	<XX>	<XX>							

		<p>Helpline/Call Centre Numbers: 020 6712 1212(Customer Care Number) Mail Us : customercare@bajajlife.com</p> <p>Contact details of the insurer: Bajaj Life Insurance Limited (Formerly known as Bajaj Allianz Life Insurance Company Limited)</p> <p>Bajaj Insurance House, Airport Rd, Yerawada, Pune, Maharashtra 411006</p> <p>Link for downloading claim form and list of documents required including bank account details: https://www.bajajlifeinsurance.com/life-insurance-claim-assistance.html</p> <p>WhatsApp- 8806727272</p>	
16.	Policy Servicing	<p>Turn Around Time (TAT): https://www.bajajlifeinsurance.com/content/dam/balic-web/pdf/customer-services/services-tat.pdf</p> <p>Helpline/Call Centre number: 020 6712 1212</p> <p>Contact details of the insurer: In case you have any query, you may communicate with the Company:</p> <ol style="list-style-type: none"> 1. By post at: Customer Care Desk, Bajaj Life Insurance Limited, Bajaj Insurance House, 5th floor, Airport Road, Yerawada, Pune – 411006 2. By Email: customercare@bajajlife.com 3. Link for downloading applicable forms and list of documents required including bank account details : https://online.bajajlife.com/online/portal/logon/serviceRequest.do?user_name=WEBSITE&p_flag=0 	Part G – Section 25
17.	Grievances /Complaints	<p>Contact details of Grievance Redressal Officer of the insurer: Grievance Redressal Officer of the insurer - In case you do not receive a response within 14 days or if you are not satisfied with the resolution, you may approach Grievance Redressal Officer at gro@bajajlife.com</p>	Part G – Section 25 & 26

		<p>Link for registering the grievance with the insurer's portal: Insurance company grievance portal –</p> <p>https://webpartner2.bajajlife.com/GrvOnlineApi/indexOnlineGrv.jsp#_ga=2.7272630.541013491.1717475077-1601763320.1694668355&_gac=1.52751388.1715749803.EAlaIQobChMly_eqivKOhgMVdWsPAh0NFQrEEAAYASA AEgJObPD_BwE</p> <p>Contact details of Ombudsman: Find your nearest Ombudsman office at https://www.cioins.co.in/ombudsman</p>	
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Declaration by the Policyholder

I have read the above and confirm having noted the details.

Place:
of the Policyholder)

(Signature

Date:

Web-link for the product where sample policy document can be downloaded:
<https://www.bajajlifeinsurance.com/tax-saving-investment-plans/assured-wealth-goal-platinum-plan.html>

Disclaimer: In case of conflict in the content mentioned hereinabove, the terms and conditions mentioned in the policy document shall prevail.