

REQUIRED DOCUMENTS FOR NEFT REGISTRATION

> Common Application Form

> NEFT Form

> Copy of PAN Card - Self Attested

> Signs near **X** marks on Common Application form & NEFT Form – Total 2 Signs



Branch Address

To,
Chief/Sr/Branch Manager
Branch Code _____

Date :

Re :- Policy number/s:- _____ Name of Life assured : _____

With reference to above policy/ies, I/we request you to do the following as per marked item :-

1) **Register / update my contact details** as follows. I also agree for receiving the SMS on the given mobile number for different policy servicing functions

i. Mobile number of policyholder only : **without prefix of 91 or 0**

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Land line number with STD code

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ii. E- Mail id _____ III) Pin code _____

2) **Note my new address** in you books as per enclosed proof of residence

Name : _____

Address : _____

_____ **Pin Code** _____

- 3) Register my Bank details for policy payment through NEFT as per enclosed mandate (with blank cheque leaf or bank pass book)
- 4) Register my PAN card number and Aadhar card number in your record (attested copy enclosed)
- 5) Change the mode of premium payment from to (if under ECS mode, attach the mandate duly countersigned by Bank) (if conversion is under SSS, then authority letters in triplicate)
- 6) Register nomination / change of nomination / Assignment / re-assignment in your book. Enclosed notice and required forms with policy document.
- 7) Transfer my policy record from your Branch to the Branch name/ code under Division for future servicing.
- 8) Issue me premium paid certificate for the financial year ending
- 9) Issue me duplicate policy bond.
- 10) Allow the alteration under above policy as 1) change in plan / term / premium paying term 2) Reduction in sum assured 3) others to be specified
- 11) Grant me Accident benefit under above policy. Enclosed DGH and policy document, endorsement fee.
- 12) Revive my policy under 1) special revival scheme 2) SB-cum-revival 3) loan-cum-revival 4) Instalment revival.
- 13) Issue me quotations for loan/ surrender / for submission to
- 14) Register 'Switch over of fund' under above ULIP policy from fund to fund
- 15) Other request

Yours faithfully,

(X)

(Signature of policyholder)

