

Customer Suitability Form

Ver 2.4



Enter customer details

Customer Name : F I R S T S U R N A M E

Customer Lifestage : ☐ Single ☐ Married ☐ Others Customer Income : ☐ <10 Lakhs ☐ 10 Lakhs - 25 Lakhs ☐ > 25 Lakhs

Purpose : ☐ Savings/ Business insurance ☐ Children Solution ☐ Retirement ☐ Protection/Business insurance

Annual premium : (We recommend that the yearly premium amount should not exceed 40% of your annual income.) Mode of premium payment : ☐ Limited Pay/ Regular Pay ☐ Single Pay

Policy Term (Goal horizon) : ☐ <10 years ☐ 11 years - 20 years ☐ > 20 years (We recommend you to select the policy term to match your goal horizon)

Premium payment term : ☐ <= 10 years ☐ > 10 years (We recommend that the premium payment term should not go beyond 65 years age or your expected earning age.)

Insurance Portfolio held (Sum Assured) :

Select customer risk profile*

☐ Aggressive/Growth Equity oriented funds ☐ Balanced Balanced funds ☐ Conservative/Risk Averse Debt oriented funds

*For ICICI Bank channel - Please select risk profile as per ICICI Bank records

Recommended Products as per customer's age band and risk profile.

Age		Aggressive/Growth	Balanced	Conservative/Risk Averse
Less than 35	Products	Life Time Classic	Life Time Classic	Life Time Classic
		Smart Life	Smart Life	Smart Life
		Signature	Signature	Signature
		Pru1 Wealth	Pru1 Wealth	Pru1 Wealth
		Smart Kid Plan (Smart Life)	Guaranteed Wealth Protector	Lakshya Wealth
		Smart Couple Plan(Smart Life)	Lakshya Wealth	Lakshya Lifelong Income
		Guaranteed Pension Plan	Lakshya Lifelong Income	Lakshya - Income
		EzyGrow	Lakshya - Income	Lakshya - Gold
		Protect N Gain	Lakshya - Gold	Assured Savings Insurance Plan
		-	Future Perfect	Savings Suraksha
		-	Smart Kid Plan (Smart Life)	Cash Advantage
		-	Guaranteed Pension Plan	Future Perfect
		-	EzyGrow	Guaranteed Income For Tomorrow
		-	Gold	GIFT (Long-term)
		-	Protect N Gain	Guaranteed Pension Plan
		-	Gold Pension Savings	Sukh Samruddhi
		-	-	EzyGrow
		-	-	GIFT (Long-term) POS
		-	-	Protect N Gain
		-	-	GIFT Pro
		-	-	GIFT Pro POS
		-	-	Gold Pension Savings
	Solutions**	Signature Insignia II	Signature Insignia II	Signature Insignia II
		Wealth Protection Solution III Aggressive	Bhavishya Nidhi II	Signature Insignia
		Bhavishya Nidhi II	Signature Insignia	Second Innings
		Signature Insignia	Retire Secure	Life Time Income
		Signature Capital Guarantee II	Signature Capital Guarantee II	Bhavishya Nidhi II
		Signature Pro Plus	Signature Pro Plus	Signature Capital Guarantee II
		All Seasons Income Plan	Lifelong GIFT	Signature Pro Plus
		Save 'N' Grow	All Seasons Income Plan	GIFT Pro Plus
		Signature Selecte'	Save 'N' Grow	GIFT Plus
		-	Signature Selecte'	Lifelong GIFT
		-	-	All Seasons Income Plan
		-	-	Save 'N' Grow
		-	-	Signature Selecte'
		-	-	SmartKid Guarantee
36 to 50	Products	Signature	Signature	Signature
		Life Time Classic	Life Time Classic	Life Time Classic
		Smart Life	Smart Life	Smart Life
		Pru1 Wealth	Pru1 Wealth	Pru1 Wealth
		Smart Couple Plan (Smart Life)	Guaranteed Wealth Protector	Lakshya Wealth
		Smart Kid Plan (Smart Life)	Lakshya Wealth	Lakshya Lifelong Income
		Guaranteed Pension Plan	Lakshya Lifelong Income	Lakshya - Income
		Saral Pension	Lakshya - Income	Lakshya - Gold
		Guaranteed Pension Plan Flexi	Lakshya - Gold	Assured Savings Insurance Plan
		EzyGrow	Future Perfect	Savings Suraksha
		Protect N Gain	Easy Retirement	Cash Advantage
		-	Smart Kid Plan (Smart Life)	Future Perfect
		-	Guaranteed Pension Plan	Easy Retirement
		-	Saral Pension	Smart Kid Plan (Smart Life)
		-	Guaranteed Pension Plan Flexi	Guaranteed Income For Tomorrow
		-	EzyGrow	GIFT (Long-term)
		-	Gold	Guaranteed Pension Plan
		-	Protect N Gain	Saral Pension
		-	Gold Pension Savings	Guaranteed Pension Plan Flexi
		-	-	Sukh Samruddhi
		-	-	EzyGrow
		-	-	GIFT (Long-term) POS
		-	-	Protect N Gain
		-	-	GIFT Pro
		-	-	GIFT Pro POS
		-	-	Gold Pension Savings

Age		Aggressive/Growth	Balanced	Conservative/Risk Averse
36 to 50	Solutions**	Signature Insignia II	Signature Insignia	Signature Insignia II
		Wealth Protection Solution III Aggressive	Signature Secure Income	Signature Insignia
		Signature Insignia	Bhavishya Nidhi II	Second Innings
		Bhavishya Nidhi II	Retire Secure	Signature Capital Guarantee II
		Signature Capital Guarantee II	Signature Capital Guarantee II	Signature Pro Plus
		Signature Pro Plus	Signature Pro Plus	GIFT Pro Plus
		All Seasons Income Plan	Lifelong GIFT	GIFT Plus
		Save 'N' Grow	All Seasons Income Plan	Lifelong GIFT
		Signature Selecte'	Save 'N' Grow	All Seasons Income Plan
		-	Signature Selecte'	Save 'N' Grow
		-	-	Signature Selecte'
		-	-	SmartKid Guarantee
51 to 59	Products	Signature	Signature	Signature
		Life Time Classic	Life Time Classic	Life Time Classic
		Smart Life	Smart Life	Smart Life
		Pru1 Wealth	Pru1 Wealth	Pru1 Wealth
		Immediate Annuity	Guaranteed Wealth Protector	Lakshya Wealth
		Guaranteed Pension Plan	Lakshya Wealth	Lakshya Lifelong Income
		Saral Pension	Lakshya Lifelong Income	Lakshya - Income
		Guaranteed Pension Plan Flexi	Lakshya - Income	Lakshya - Gold
		EzyGrow	Lakshya - Gold	Assured Savings Insurance Plan
		Protect N Gain	Future Perfect	Savings Suraksha
		-	Easy Retirement	Cash Advantage
		-	Immediate Annuity	Future Perfect
		-	Guaranteed Pension Plan	Easy Retirement
		-	Saral Pension	Immediate Annuity
		-	Guaranteed Pension Plan Flexi	Guaranteed Pension Plan
		-	EzyGrow	Guaranteed Income For Tomorrow
		-	Gold	Saral Pension
		-	Protect N Gain	GIFT (Long-term)
		-	Gold Pension Savings	Guaranteed Pension Plan Flexi
		-	-	Sukh Samruddhi
		-	-	EzyGrow
		-	-	GIFT (Long-term) POS
		-	-	Protect N Gain
		-	-	GIFT Pro
		-	-	GIFT Pro POS
		-	-	Gold Pension Savings
	Solutions**	Wealth Protection Solution III Aggressive	Signature Secure Income	Second Innings
		Signature Insignia	Second Innings	Signature Insignia II
		Signature Insignia II	Retire Secure	Guaranteed Increasing Pension
		Guaranteed Increasing Pension	Guaranteed Increasing Pension	Signature Capital Guarantee II
		Signature Capital Guarantee II	Signature Capital Guarantee II	Signature Pro Plus
		Signature Pro Plus	Signature Pro Plus	GIFT Pro Plus
		All Seasons Income Plan	Lifelong GIFT	GIFT Plus
		Save 'N' Grow	All Seasons Income Plan	Lifelong GIFT
		Signature Selecte'	Save 'N' Grow	All Seasons Income Plan
		-	Signature Selecte'	Save 'N' Grow
		-	-	Signature Selecte'
60 and above	Products / Solutions**	-	-	SmartKid Guarantee
		Immediate Annuity	Immediate Annuity	Immediate Annuity
		Guaranteed Pension Plan	Guaranteed Pension Plan	Guaranteed Pension Plan
		Pru1 Wealth	Easy Retirement	Easy Retirement
		Guaranteed Increasing Pension	Pru1 Wealth	Pru1 Wealth
		Saral Pension	Guaranteed Increasing Pension	Guaranteed Increasing Pension
		Guaranteed Pension Plan Flexi	Saral Pension	Saral Pension
		-	Guaranteed Pension Plan Flexi	Guaranteed Pension Plan Flexi

**Solutions are a combination of benefits of two or more individual and separate products as mentioned below

Lakshya-Income and Lakshya-Gold plans are offered under ICICI Pru Lakshya

Recommended Products/Solutions for Protection/Protection with Money Back option

iProtect Smart	Saral Jeevan Bima	ICICI Pru iProtect Return of Premium	iProtect Smart Money Back**	IPS Signature Moneyback** (Recommended for Risk Profiles other than Conservative/Risk Averse)	iProtect Smart Return of Premium**	iShield
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Signature Insignia	Signature & iProtect Smart & Immediate Annuity
Signature Insignia II	Signature & iProtect Smart
Wealth Protection Solution III Aggressive	Life Time Classic & iProtect Smart
Life Time Income	Cash Advantage & Immediate Annuity
iProtect Smart Money Back	Savings Suraksha and iProtect Smart
IPS Signature Moneyback	Signature (Balanced/Debt oriented asset allocation) & iProtect Smart
Guaranteed Increasing Pension	Combination of three Guaranteed Pension Plan
Signature Capital Guarantee II	Signature & GIFT
Signature Pro Plus	Signature & iProtect Smart POS
GIFT Pro Plus	GIFT & iProtect Smart POS
GIFT Plus	Combination of GIFT options
Lifelong GIFT	GIFT & Lakshya Lifelong Income
iProtect Smart Return of Premium	GIFT & iProtect Smart

Bhavishya Nidhi II	Life Time Classic & iProtect Smart
Retire Secure	Future Perfect & Immediate Annuity
Signature Secure Income	Signature & Assured Savings Insurance Plan
Second Innings	Savings Suraksha & Immediate Annuity
Family Income Solution III - Aggressive	Life time Classic & iProtect Smart & Immediate Annuity
Foreign Education Gifting Solution - Classic	Life Time Classic & Future Perfect
iProtect Wealth Guarantee	Guaranteed Wealth Protector & iProtect Smart

DECLARATION (PLEASE TICK AS APPLICABLE):

☐ I/We have understood the features of the product and believe it would be suitable for me/our insurance objective. I/We concur that I/we have availed the product after understanding the suitability of the product(s) as per my/our needs. I/We understand that the product(s) and fund(s) recommended to me are based on the information provided by me/us and which is considered suitable in the view and understanding of licensed intermediary and/or ICICI Prudential. I/We declare that the information provided by me for my risk profiling and recommendation is correct and I/we will not hold licensed intermediary and/or ICICI Prudential responsible for my acceptance of product(s) and fund(s) recommended.

OR

☐ I/We have gone through the list of product(s) and fund(s) recommended to me based on the risk profiling conducted by the licensed intermediary and/or ICICI Prudential. I/We wish to supersede the recommendations of licensed intermediary and/or ICICI Prudential and have opted for the Life Insurance product(s) as highlighted above. I/We agree to purchase the product(s) based on my independent assessment of the risks, merits and suitability of the product(s). I/We will not hold the licensed intermediary and/or ICICI Prudential responsible for my acceptance of such product(s) and fund(s) as per my/our understanding.

Signature of Prospect / Policyholder

Date :

Signature of Agent / Intermediary / Official

Date :