APPLICATION FOR CHANGE IN PORTFOLIO STRATEGY(CIPS)

ICICI PRUDENTIAL LIFE INSURANCE

This feature is applicable only for LifeStage RP, LifeStage Pension, LifeStage Assure, LifeStage Assure Pension, Assure Life, LifeTime Maxima and as stated in the policy terms & conditions document.

Policy Number | | | | | | | | | **Date** D D M M Y Y Y Y

Name of Proposer Mr./Ms./Mrs. | First Name | Middle Name | Surname

Contact Numbers STD | Residence | STD | Office | Ext. | Mobile

E-Mail ID

Please change my Portfolio strategy as indicated below:

☐ **From Fixed Portfolio Strategy to Life Cycle Based Portfolio Strategy or Trigger Portfolio Strategy.**

- Upon this change the entire fund under this policy will be allocated to Flexi Growth IV & Protector IV as per Life Assured's age & the policy year in case of Life Cycle Based Portfolio Strategy / to Multi Cap Growth & Income in the ratio of 75 % & 25% in case of Trigger Portfolio Strategy.
- The future premiums shall continue to be allocated as per the investment applicable in the Life Cycle Strategy / Trigger Portfolio Strategy as mentioned in the policy document.

OR

☐ **From Life Cycle Based Portfolio Strategy / Trigger Portfolio Strategy to Fixed Portfolio Strategy.**

I wish to allocate my entire funds in the policy as indicated below:

Enter **Percentage** of the amount to be transferred from Flexi Growth and Protector to the fund desired

	Flexi Growth	Protector	Flexi Balanced	Preserver	Maximiser*	Multiplier	Balancer	RICH	Total
Flexi Growth									
Protector									

	Multi Cap Growth	Income	Multi Cap Balanced	Bluechip	Opportunities	Money Market	Total
Multi Cap Growth							
Income							

*Maximiser shall not be available for investment to policyholders whose application is received at the Companys office after February 22, 2008.

- This would allocate the entire fund value from existing allocation to the allocation specified by you as per the table above.
- Please ensure that the sum of percentages in the table is not more than 100%.
- The future premiums shall continue to be allocated as per the requested proportion mentioned by you in the table above.

Instructions:

- CIPS is free & is allowed FOUR times in the policy term for Life Cycle Portfolio Strategy / once every policy year for Trigger Portfolio Strategy.
- CIPS shall be applicable for the entire fund value. Partial allocations between the two portfolio strategies is not allowed.
- If the application for CIPS is received by 3.00 p.m. on a weekday, the same day's unit value will be applicable. However, if the application for CIPS is received after 3.00 p.m. on a weekday, then the next working day's unit value will be applicable.(NAV gets declared by the company on daily basis except on bank holidays, Exchange holidays, Saturdays, Sundays & the days on which Corporate Office is closed)
- If the application for CIPS is received after 3.00p.m. on a Friday, or any time on a Saturday, or by 3.00 p.m. on Monday, then Monday's unit value will be applicable (provided Monday is a working day).
- If the application for CIPS is received on the last day of the financial year, the NAV of that day would be applicable.

Please Note that in case your policy is assigned, the CIPS would be accepted if the consent from the assignee of the policy is received.

Time Stamp

Signature of the Proposer/ Policy Owner

Signature of the Assignee

MAY, 2009

ACKNOWLEDGEMENT OF APPLICATION FOR CIPS FROM:

☐ **Fixed to Life Cycle Based / Trigger Portfolio Strategy** ☐ **Life Cycle Based / Trigger to Fixed Portfolio Strategy**

Proposal/ Policy No.: _____

Name of Policy Holder: _____

Branch Name: _____

Date: D D M M Y Y Y Y

Stamp

Received by: _____

Note: 1. The CIPS will be effective on receipt of this completed form at an ICICI Prudential Authorized Centre, subject to Policy terms & conditions.
2. For LifeStage Assure, LifeStage Assure Pension and Assure Life, Switch is not allowed before the first policy anniversary as the first year premium is retained towards providing Guaranteed Addition on maturity and units are not available for any transaction