

APPLICATION FOR CHANGE IN PORTFOLIO STRATEGY(CIPS)



Policy Number

Date

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 & Protector 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
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

Enter **Percentage** of the amount to be transferred from Multi Cap Growth Fund and Income Fund

Multi Cap Growth	Income	Multi Cap Balanced	Bluechip	Opportunities	Money Market	Dynamic	Total
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

- First premium investment in RGF cannot be reallocated through CIPS
- 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 3.00 p.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 by 3.00 p.m. 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.

Signature of the Proposer/ Policy Owner

Signature of the Assignee

Time Stamp

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:

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 Guarantee products, CIPS 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