

REQUEST FOR CHANGE IN POLICY DETAILS



Policy Number

Date

Barcode

Name of Proposer

Mr./Ms./Mrs.

First Name

Surname

Contact Nos.

STD

Residence

STD

Office

Ext.

ISD

Mobile

E-Mail ID

All fields are mandatory. (Atleast one contact no. is mandatory for processing your request. The Contact details mentioned above will be updated for all future communication)

Change in Premium Payment Frequency

Monthly Half Yearly Yearly (This change will be applicable from the next premium payment date)

Note: • This change will be applicable from the next premium payment date • For monthly mode, standing instructions is mandatory. Please fill the NACH Direct Debit form and submit the same along with this form. • Change in premium frequency will have an impact on change in premium

Change in Premium Payment Mode

Cheque Direct Debit/ECS (NACH) Bill Desk Bill Junction

Note: • If payment through Direct Debit / ECS (NACH) is selected, mandate needs to be filled and submitted at the nearest ICICI Prudential Life Insurance branch.

Change in Insurance amount (Sum Assured)

From ₹ Required ₹

Note: In case of increase in Sum Assured, a Personal Health Declaration Form (PDR) will have to be submitted along with this form

Change in Annual Premium

From ₹ Required ₹

Note: • Any change in the premium that needs to be paid can only be done at Policy Anniversary • Change in premium contribution can be made subject to terms and conditions

Request for Policy Statements / Receipts

E-Welcome Kit Unit Statement Premium Paid Certificate Others _____ (Please specify)

Change in Save the date (Applicable for GIFT, GIFT Long term, GIFT Pro, Gold and Sukh Samruddhi)

Preferred date to receive Guaranteed Income

Frequency change of receiving Guaranteed Income:

Monthly Annually

Note: • Please note the income amount may increase or decrease due to change in the date preferred to receive guaranteed income • The said feature will be eligible only for yearly Guaranteed Income payout frequency (Excluding ICICI Pru GOLD Plan).

Savings Wallet (Applicable for Sukh Samruddhi/ Gold)

Activate Deactivate

• Incase of deactivation, only future GIs will be processed in the bank account. However the balance lying in wallet will continue to lie unless there is specific request for full withdrawal.
• Incase there is no withdrawal, the money lying in wallet will be processed at exist transaction i.e., maturity or surrender.

Withdrawal Option:

Complete withdrawal Partial withdrawal amount ₹ _____

(Wallet feature will continue, unless deactivation requested for)

Note: • The policyholder has an option to accumulate GIs, instead of taking as payment during the policy term. • The GIs will be accumulated daily at an interest rate equal to Reverse Repo Rate published by RBI. • The policyholder also has an option to withdraw, completely or partially, the accumulated GIs anytime during the Income Term and subject to TDS (if any).
• In case the accumulated GIs are not withdrawn completely during the policy term, the accumulated GIs will be paid to the claimant in the event of death, maturity or surrender, whichever is earlier along with other benefit payments (if any), and the policy will terminate.

Premium Offset (Applicable for Gold)

Activate Deactivate

Note: • The said feature is only applicable for premium adjustment for same policy provided the savings wallet option is active. • Incase premium is not sufficient difference premium to be paid by the policyholder. • Incase difference premium not paid the amount utilized from wallet for premium payment will credit back to wallet.

ECS Preferred Date:

Premium Due Date Preferred Account Hit Date :

Preferred due date can be any day between your premium due date and the next 11 days.

Please Note:

1. This is a servicing request only 2. The preferred account hit date is for purpose of premium debit only. 3. NAV applicable on the account hit date would allotted to the policy account 4. All policy benefits would be applicable as per the premium due date mentioned in the policy document 5. All account details related to ECS debit would remain the same (as provided in the ECS mandate)

ACKNOWLEDGEMENT SLIP

This is to acknowledge the receipt of application for change in:

- | | | | |
|---|---|---|---|
| <input type="checkbox"/> Premium Payment Frequency | <input type="checkbox"/> Premium Payment Mode | <input type="checkbox"/> Insurance amount (Sum Assured) | <input type="checkbox"/> Annual Premium |
| <input type="checkbox"/> Request for Policy Statements / Receipts | <input type="checkbox"/> Save the date | <input type="checkbox"/> Savings Wallet | <input type="checkbox"/> Withdrawal Option(Saving Wallet) |
| <input type="checkbox"/> Premium Offset | <input type="checkbox"/> ECS Preferred Date | <input type="checkbox"/> Rider/Additional benefit | <input type="checkbox"/> Policy Discontinuance |
| <input type="checkbox"/> Request for Foreclosure Reversal | <input type="checkbox"/> Cover Continuance Option | <input type="checkbox"/> Consent for sharing Policy Details | |

Policy Number

Date

Received By

STAMP
&
TIME

Request for Rider/Additional benefits addition

Rider/Additional benefit name: _____ Sum Assured ₹ _____

Note: Refer T&C for conditions on Rider addition

Please provide the following information:

Does your occupation/hobbies require you to engage in manual labour or hazardous activities or be part of military/paramilitary/security/merchant navy forces or require handling hazardous material (e.g. working with dangerous or corrosive chemicals, explosives, radiation, working underwater/underground or at height, working in mines, non-commercial flying activities, diving, mountaineering, any form of motorbike/car racing etc.) YES NO

If Yes, give details _____

Has any of your insurance application or reinstatement application on life, accident, medical or health, critical illness, or disability ever been declined, postponed or accepted at extra premium or modified terms?

If Yes, give details _____

Have you in past or are you currently suffering from any congenital defect/ physical or mental defects/impairment/infirmity/leformity or any condition that may affect your mobility/ sight/hearing/speech? OR Have you ever suffered or are suffering from or been advised to undergo regular medical consultation/investigations or treatment including hospitalization for poliomyelitis/Nervous disorders/stroke/paralysis/epilepsy psychiatric disorders?

If Yes, give details _____

Policy Discontinuance

I am fully aware that I will not be entitled to any policy benefit after Discontinuing it. I will only receive the Discontinuance Policy Fund Value after deduction of applicable charges, upon completion of the fifth policy year.

Request for Foreclosure Reversal

• I hereby request you to revive my policy number which has been foreclosed

DECLARATION

- I understand that the Company has accepted my request for foreclosure reversal of the above policy purely as a gesture of goodwill.
- I undertake to pay regular premiums and keep the policy in force so that I can continue to enjoy the benefits available under the same.
- I agree and undertake that I will not surrender the above policy at least for a period of one year from the date of this request. Further, I also agree and undertake that I will not assign the above policy for a period of one year to any individual entity.
- I agree and understand that if I submit any request for (i) surrender or (ii) assignment of the policy to any individual entity, within one year from the date of this request then the Company will not be under any obligation to process my request and I shall not hold the company liable for the same

Cover Continuance Option (CCO) / Automatic Premium Payment (APP)

Register for CCO / APP Deletion of CCO / APP

Note: • Cover Continuance gives you the option of continuing your life cover and the rider cover even if you stop paying premiums. If the fund value reaches the minimum requirement, the policy would be foreclosed and surrender value would be paid to you. • During cover continuance period the mortality and policy administration charges will be deducted via cancellation of units. • Future premiums for this policy will not be accepted once the cover continuance option is activated. • On activation of APP, premium will be collected through cancellation of units. • APP can be availed once if term less than 15 years and twice if term is greater than 15 years. • APP facility is available only in Investshield Cash (U28), Investshield Life (U29), Investshield Pension (U30) and Investshield Gold (U34). • APP facility can be deleted only if the same has been registered but not activated

Consent for sharing Policy Details

I/We provide consent for sharing policy details with my/our servicing agents

I/We do not wish to share my/our policy details with my/our servicing agents.

Note: Policy details includes fund value, unit statement and portfolio statement details, bonus amounts, etc

DECLARATION

Applicable when the Proposer is illiterate or suffering from disability due to which writing is restricted or the proposer has signed in vernacular language. Note: Must be witnessed by someone other than the advisor/agent/employee of the Company.

I (Full name of Witness) _____ (Relation with Proposer) _____ adult and inhabitant of (Address) _____

do hereby declare that I have read and explained the contents of this form to the Proposer and he/she/they have understood the same.

Signature of Witness

Signature of Policy Holder (Proposer): _____

Signature of Assignee* / Trustee : _____

(*Required in case of Absolute Assignment of Policy)

(*Required in case of Policy covered under MWPA)

Note: I have understood the meaning and scope of the change request form and take complete responsibility of the changes submitted by me. Any changes in the Policy / Personal Details are subject to the policy terms and conditions and relevant underwriting guidelines.

FOR OFFICE USE ONLY:

ER Request submitted by C S CR CS

Spaarc Call ID _____

Date

Scanning Cabinet _____

Received By _____

Remarks _____

STAMP
&
TIME

Kindly call our Customer Service Number 1800 2660 (toll-free)
Call Center timings: 10.00 A.M. to 7.00 P.M. Monday to Saturday (except national holidays)



Communication Address

ICICI Prudential Life Insurance Co. Ltd., Unit No. 901A, 901B, 1001A & 1002B, Prism Towers, Mindspace, Link Road, Goregaon (West), Mumbai-400104.
COMP/DOC/Aug/2023/88/3752.