

**FREELook/EXTENDED FREELook REQUEST:
CUSTOMER RETENTION & SALES VALIDATION FORM**



Visit Date:

Customer Name: _____ Status: ☐ Indian ☐ NRI

Policy No.: _____ Mobile No.: _____

Mode: ☐ Physical Branch: _____

1 CUSTOMER CONCERN & VISIT CONFIRMATION

Brief Summary of Discussion: _____

Reason for Freelook Request (Tick):

- ☐ Personal Reason ☐ Financial Reason ☐ Product is not fitting into my overall financial plan
☐ Not satisfied with returns ☐ Not Satisfied with Terms & Conditions ☐ Higher duration of Premium paying tenure
☐ Returns are not guaranteed ☐ Does not provide flexibility to withdraw whenever I want

☐ Others: _____

2 SALES ACCOUNTABILITY

Bank Sourcer Name & Emp Code: _____ Signature: _____

Branch Manager Name & Emp Code: _____ Signature: _____

IPRU RM Name & Emp Code: _____ Signature: _____

3 RETENTION ACTION & OUTCOME

Actions Taken (Tick):

- ☐ Explained Benefits ☐ Re-aligned Plan ☐ Alternative Offered ☐ Issue Resolved ☐ Not Interested

Remarks: _____

4 CUSTOMER FINAL CONFIRMATION

- ☐ I wish to continue the policy & hereby confirm and acknowledge that I fully understand and accept all policy benefits, terms & conditions
☐ Cancel Policy, (Reason/VoC): _____

Customer Name: _____

Customer Signature

FOR LIFE INSURANCE PARTNER VERIFICATION & DECLARATION

I hereby certify and confirm that I have personally engaged with the customer, and that all details captured herein were completed in my presence and have been duly reviewed and validated by me

IPRU RM 'or' Authorized Officer Name & Emp Code: _____

Signature

Date

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/Jul/2026/37/0521.