## **10M ASSIGNMENT FORM**

## Important instructions for you to proceed:



- All fields are mandatory
- Assignor is the policyholder intending to assign the policy. Assignee is any person/institution in whose favour the policy is assigned
- the policy is assigned

  Every assignment should be treated as an absolute assignment and the assignee shall be deemed to be an absolute assignee except where assignment is subject to terms and conditions of the assignment agreed by the assignor and assignee

<ul> <li>If more than one policy is to be assigned separate forms are to be filled up in respect of each of them</li> <li>A nomination gets cancelled in the case of assignment until reassigned</li> <li>Post assignment of the policy, the Assignee will be entitled to all the payouts/ benefits subject to the terms and conditions of the transfer/assignment</li> </ul>
POLICY DETAILS
Policy Number
Name of Proposer Mr./Mrs./M/S.
Address
Landmark Pin Code Pin Code
Contact Nos. STD Residence STD Office Ext. ISD Mobile
E-Mail ID
*CKYC Number (If available):
Purpose of Assignment*
Loan Love & Employee welfare/ Firm Retirement/resignation of the Director/keyman against Loan Transfer of business
Others (if other selected reason is mandatory)
With consideration – Amount ₹ (in words) Without consideration
Terms of Assignment  Future premiums will be paid by Assignor Assignee
Future service request including Partial Withdrawal/ Surrender request to be authorised by Assignor  How are you assigning the policy This assignment form Separate Instrument (agreement, board resolution etc)  If separate instrument please specify the date of assignment and submit a copy of the same.
How are you assigning the policy  This assignment form Separate Instrument (agreement, board resolution etc)
How are you assigning the policy  This assignment form Separate Instrument (agreement, board resolution etc) If separate instrument please specify the date of assignment and submit a copy of the same.  DETAILS OF THE ASSIGNEE  Name of the Assignee
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How are you assigning the policy  This assignment form Separate Instrument (agreement, board resolution etc) If separate instrument please specify the date of assignment and submit a copy of the same.  DETAILS OF THE ASSIGNEE  Name of the Assignee  Mr./Mrs./M/S.
How are you assigning the policy  This assignment form Separate Instrument (agreement, board resolution etc) If separate instrument please specify the date of assignment and submit a copy of the same.  DETAILS OF THE ASSIGNEE  Name of the Assignee  Mr./Mrs./M/S.  Residential Address
How are you assigning the policy  This assignment form Separate Instrument (agreement, board resolution etc)  If separate instrument please specify the date of assignment and submit a copy of the same.  DETAILS OF THE ASSIGNEE  Name of the Assignee Mr./Mrs./M/S.  Residential Address Pin Code  Contact Nos.
How are you assigning the policy This assignment form Separate Instrument (agreement, board resolution etc) If separate instrument please specify the date of assignment and submit a copy of the same.  DETAILS OF THE ASSIGNEE  Name of the Assignee Mr./Mrs./M/S.  Residential Address Pin Code  Contact Nos. STD Residence STD Office Ext. ISD Mobile
How are you assigning the policy  This assignment form Separate Instrument (agreement, board resolution etc)  If separate instrument please specify the date of assignment and submit a copy of the same.  DETAILS OF THE ASSIGNEE  Name of the Assignee  Mr/Mrs/M/S.  Residential Address  Landmark Pin Code  Contact Nos. STD Residence STD Office Ext. ISD Mobile  Name of Organisation
How are you assigning the policy  This assignment form Separate Instrument (agreement, board resolution etc)  If separate instrument please specify the date of assignment and submit a copy of the same.  DETAILS OF THE ASSIGNEE  Name of the Assignee  Mr/Mrs/M/S.  Residential Address  Landmark Pin Code  Contact Nos. STD Residence STD Office Ext. ISD Mobile  Name of Organisation
How are you assigning the policy  This assignment form Separate Instrument (agreement, board resolution etc) If separate instrument please specify the date of assignment and submit a copy of the same.  DETAILS OF THE ASSIGNEE  Name of the Assignee  Mr./Mrs./Mrs.  Residential Address  Pin Code  Contact Nos.  STD Residence STD Office Ext. ISD Mobile  Name of Organisation  Official Address
How are you assigning the policy  This assignment form Separate Instrument (agreement, board resolution etc) If separate instrument please specify the date of assignment and submit a copy of the same.  DETAILS OF THE ASSIGNEE  Name of the Assignee Mr./Mrs./M/S.  Residential Address  Contact Nos. STD Residence STD Office Ext. ISD Mobile  Name of Organisation  Official Address  Landmark  Pin Code  Pin Code
How are you assigning the policy  This assignment form  Separate Instrument (agreement, board resolution etc)  If separate instrument please specify the date of assignment and submit a copy of the same.  DETAILS OF THE ASSIGNEE  Name of the Assignee

Deletionalia citib Acciones		
Relationship with Assignor		
Immediate Family Member: Father Mother Spouse		rand Mother Others
	JF/Member HUF Lender/Borrower Socie	
Date of Birth DDMMYYYYGender Male	Female Is the Assignee Employee Ad	visor Relative of Employee None or Advisor
Resident Status Resident NRI PIO Foreign	National Resident Country	Nationality Indian Non Indian
Marital Status Unmarried Married Wide	ow(er) Divorced	
Occupation Salaried Professional Self B	Employed/Businessman Student House	wife Retired Others
Annual Income ₹		
Industry Type		g/Construction Agriculture
Stock Broking Others  Notice of Assignment	<del></del>	
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I/We		, the assignor, have read and
understood the above instructions and, subject to the above in	3 1 7	nee mentioned herein above.
On $\square$ $\square$ $\square$ $\square$ $\square$ $\square$ $\square$ $\square$ $\square$ , the policy will be assigned to	assignee.	
(This is the date when the policy benefits are first vested)		
Date DD MM YYYY		
Place	Signature of Assignor	Signature of Assignee
PAN UPDATION OF THE ASSIGNEE		
Kindly submit PAN/Form 60 (as defined under Income Tax Act	1962) if not already submitted at the time of an	plying for the policy Also PAN/Form 60
is mandatory where the premium amount exceeds ₹ 50,000 premium collection modes. Where any customer/policyholder	in a Financial year. The premium payment can	be done only through the acceptable
₹49,999/- only at the authorised collection points.		
*PAN Number		
If you have selected "Trust", "Society", or "Section B / Section 25 Compan	y" or if the fourth letter of your PAN is "S" or "T", please sul	omit the NPO declaration along with this form.
Name (as is appears on the PAN Card) Salutation	First Name	Surname
Document Submitted PAN Card Copy Form 60	Form 61	
KYC Documents of the Assignee:		
1) Recent Photograph		
2) PAN/form 60 for individual assignees 3) Officially valid document		
- Passport		Photo
- Proof of possession of Aadhaar (First 8 digit of Aadhaar sho	ould be in the masked form)	Filoto
- Driving License		
<ul> <li>Voter ID card issued by Election Commission of India</li> <li>Job card issued by NREGA duly signed by an officer of the St</li> </ul>	ate Government	
- Letter issued by the National Population Register containi		nent as
notified by the Central Government in consultation with the		
4. Income proof (if applicable) 5. NPO declaration (if applicable)		
Politically Exposed Persons" (PEPs) are individuals who have	been entructed with preminent public functions b	va foreign country including the heads
of States or Governments, senior politicians, senior governn important political party officials.		
If answer to above question is "Yes", kindly answer th	ne questions mentioned below	
1. Are you a Politically exposed person (Active Member / Inact	ive Member / Relative of PEP / Close Acquaintand	ce of PEP)?
2. Please specify the extent of political involvement (Political exp	erience, affiliation to political party, social worker, w	hether party in power, portfolio handed).
3. Please specify your previous occupation. Since how many y	years are you involved in politics?	
4. Please specify all the sources of income.		
FOR OFFICE USE ONLY:		
☐ ER Request submitted by ☐ C ☐ S ☐ CR ☐ CS		
Spaarc Call ID	Date DD MM YYYY	STAMP
	Received By	& TIME
Remarks	,	

## DECLARATION

Assignment will be as per Section 38 of the Insurance Act

I/we agree that the PAN details and other information provided by me/us in this form maybe used by the Company to download/verify/ register/ update my/our KYC  $documents on/from the CERSAI^*CKYC\ portal for\ processing this\ request, any future\ applications, or\ any\ other\ requests.\ I/We\ understand\ that\ only\ the\ acceptable\ officially$ valid documents would be relied upon for processing any requests/applications.(\*Central Registry of Securitisation and Asset Reconstruction and security Interest of

I hereby declare that the details furnished above are true and correct to the best of my knowledge and belief and I undertake to inform you of any changes therein, immediately. In case any of the above information is found to be false or untrue or misleading or misrepresenting, I am aware that ICICI Prudential reserves the right to take appropriate action.

- The submission of a duly filled and signed Assignment form along with the requisite documents will be treated as adequate notice of assignment of the policy
- Immediately after an assignment (whether by an endorsement on the policy or by a deed of assignment) has been executed, the Policy/ deed of assignment along with the Policy must be sent to the Company at its offices as specified below for registration of the assignment the policy must be sent to the Company at its offices as specified below for registration of the assignment to the Company at its offices as specified below for registration of the assignment to the Company at its offices as specified below for registration of the assignment to the Company at its offices as specified below for registration of the assignment to the Company at its offices as specified below for registration of the assignment to the Company at its offices as specified below for registration of the assignment to the Company at its offices as specified below for registration of the assignment to the company at its offices as specified below for registration of the assignment to the company at its office at the company at its
- In the event of the assignment of the Policy not being notified to the Company as above it will not be operative and will not confer upon the Assignee or his legal representatives any rights as against the Company. Priority of claims after assignment will be governed strictly by the order in which notices of assignments have been delivered to/received by the Company at its specified office
- Subject to the terms and conditions of the assignment, the Company shall post due acceptance, recognize the assignee named in the notice as the only person entitled to the benefit under the policy
- If the application for assignment is rejected by the insurer, the customer may approach IRDAI within 30 days of receipt of the notice of rejection

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Received By

**Policy Number** Date DDMM Address proof from the

ID proof from the OVDs **Documents Submitted** Policy Certificate mentioned above OVDs mentioned above Photograph Income Proof PAN/Form 60

STAMP TIME

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



Communication Address