## **Customer Suitability Form**

Ver 2.1



Litter Customer details						
Customer Name: F I R S T						
Customer Lifestage : Single Married Others Customer Income : <10 Lakhs 10 Lakhs - 25 Lakhs > 25 Lakhs						
Purpose: Savings/ Business insurance Children Solution Retirement Protection/Business insurance						
Annual premium : (We recommend that the yearly premium amount should not exceed 40% of your annual income.)  Mode of premium payment : Limited Pay/ Regular Pay						
Policy Term (Goal horizon): <10 years 11 years - 20 years > 20 years (We recommend you to select the policy term to match your goal horizon)						
Premium payment term: <= 10 years						
Insurance Portfolio held (Sum Assured) :						
For Protection/Protection with Money Back option:						
iProtect Smart iProtect Smart Money Back**						
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Select customer risk profile*						
Aggressive/Growth Balanced Conservative/Risk Averse						
Equity oriented funds Balanced funds Debt oriented funds						
*For ICICI Bank channel - Please select risk profile as per ICICI Bank records						

## Recommended Products as per customer's age band and risk profile.

Age		Aggressive/Growth	Balanced	Conservative/Risk Averse
Less than 35		Life Time Classic	Life Time Classic	Life Time Classic
		Smart Life	Smart Life	Smart Life
		Signature	Signature	Signature
		Pru1 Wealth	Pru1 Wealth	Pru1 Wealth
	Products	Smart Kid Plan (Smart Life)	Lakshya Wealth	Lakshya Wealth
		Smart Couple Plan(Smart Life)	Lakshya Lifelong Income	Lakshya Lifelong Income
		-	Lakshya - Income	Lakshya - Income
		-	Lakshya - Gold	Lakshya - Gold
		-	Future Perfect	Assured Savings Insurance Plan
		-	Smart Kid Plan (Smart Life)	Savings Suraksha
		-	-	Cash Advantage
		-	-	Future Perfect
	Solutions**	Signature Insignia II	Signature Insignia II	Signature Insignia II
		Wealth Protection Solution III Aggressive	Bhavishya Nidhi II	Signature Insignia
		Signature Insignia	Signature Insignia	Second Innings
		Bhavishya Nidhi II	Retire Secure	Life Time Income
		-	-	Bhavishya Nidhi II
		Signature	Signature	Signature
		Life Time Classic	Life Time Classic	Life Time Classic
		Smart Life	Smart Life	Smart Life
		Pru1 Wealth	Pru1 Wealth	Pru1 Wealth
		Smart Couple Plan (Smart Life)	Lakshya Wealth	Lakshya Wealth
		Smart Kid Plan (Smart Life)	Lakshya Lifelong Income	Lakshya Lifelong Income
		Smart Riu Fian (Smart Life)	Lakshya - Income	Lakshya - Income
	Products	-	Lakshya - Gold	Lakshya - Gold
		-		
36 to 50		-	Future Perfect	Assured Savings Insurance Plan
		-	Easy Retirement	Savings Suraksha
		-	Smart Kid Plan (Smart Life)	Cash Advantage
		-	-	Future Perfect
		-	-	Easy Retirement
		-	-	Smart Kid Plan (Smart Life)
		Signature Insignia II	Signature Insignia	Signature Insignia II
	Solutions**	Wealth Protection Solution III Aggressive	Signature Secure Income	Signature Insignia
		Bhavishya Nidhi II	Bhavishya Nidhi II	Second Innings
		Signature Insignia	Retire Secure	-
	Products	Signature	Signature	Signature
		Life Time Classic	Life Time Classic	Life Time Classic
		Smart Life	Smart Life	Smart Life
		Pru1 Wealth	Pru1 Wealth	Pru1 Wealth
		Immediate Annuity	Lakshya Wealth	Lakshya Wealth
		-	Lakshya Lifelong Income	Lakshya Lifelong Income
		-	Lakshya - Income	Lakshya - Income
		-	Lakshya - Gold	Lakshya - Gold
51 to 59		-	Future Perfect	Assured Savings Insurance Plan
		-	Easy Retirement	Savings Suraksha
		-	Immediate Annuity	Cash Advantage
		-	-	Future Perfect
		-	-	Easy Retirement
		-	-	Immediate Annuity
=	Solutions**	Wealth Protection Solution III Aggressive	Signature Secure Income	Second Innings
		Signature Insignia	Second Innings	Signature Insignia II
		Signature Insignia II	Retire Secure	-
		Immediate Annuity	Immediate Annuity	Immediate Annuity
60 and above	Products	Pru1 Wealth	Easy Retirement	Easy Retirement
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<sup>\*\*</sup>Solutions are a combination of benefits of two or more individual and separate products as mentioned below Lakshya-Income and Lakshya-Gold plans are offered under ICICI Pru Lakshya

Signature Insignia	Signature & iProtect Smart & Immediate Annuity
Signature Insignia II	Signature & iProtect Smart
Wealth Protection Solution III	Life Time Classic & iProtect Smart
Aggressive	
Life Time Income	Cash Advantage & Immediate Annuity
iProtect Smart Money Back	Savings Suraksha and iProtect Smart

Bhavishya Nidhi II	Life Time Classic & iProtect Smart
Retire Secure	Future Perfect & Immediate Annuity
Signature Secure Income	Signature & Assured Savings Insurance Plan
Second Innings	Savings Suraksha & Immediate Annuity

## **DECLARATION (PLEASE TICK AS APPLICABLE):**

I/We have understood the features of the product and believe it would be suitable for me/our insurance objective. I/We concur that I/we have availed the product after understanding the suitability of the product(s) as per my/our needs. I/We understand that the product(s) and fund(s) recommended to me are based on the information provided by me/us and which is considered suitable in the view and understanding of licensed intermediary and/or ICICI Prudential. I/We declare that the information provided by me for my risk profiling and recommendation is correct and I/we will not hold licensed intermediary and/or ICICI Prudential responsible for my acceptance of product(s) and fund(s) recommended.

## OR

I/We have gone through the list of product(s) and fund(s) recommended to me based on the risk profiling conducted by the licensed intermediary and/or ICICI Prudential. I/We wish to supersede the recommendations of licensed intermediary and/or ICICI Prudential and have opted for the Life Insurance product(s) as highlighted above. I/We agree to purchase the product(s) based on my independent assessment of the risks, merits and suitability of the product(s). I/We will not hold the licensed intermediary and/or ICICI Prudential responsible for my acceptance of such product(s) and fund(s) as per my/our understanding.

	Signature of Prospect / Policyholder	Signature of Agent / Intermediary / Official
Date :	: D D M M Y Y Y	Date :         D         D         M         M         Y         Y         Y