

Customer Suitability Form

Ver 2.2



Enter customer details

Customer Name :

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 Single 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 > 10 years (We recommend that the premium payment term should not go beyond 65 years age or your expected earning age.)

Insurance Portfolio held (Sum Assured) :

For Protection/Protection with Money Back option:

iProtect Smart iProtect Smart Money Back**

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	Products	Life Time Classic	Life Time Classic	Life Time Classic
		Smart Life	Smart Life	Smart Life
		Signature	Signature	Signature
		Pru1 Wealth	Pru1 Wealth	Pru1 Wealth
		Smart Kid Plan (Smart Life)	Guaranteed Wealth Protector	Lakshya Wealth
		Smart Couple Plan(Smart Life)	Lakshya Wealth	Lakshya Lifelong Income
		-	Lakshya Lifelong Income	Lakshya - Income
		-	Lakshya - Income	Lakshya - Gold
		-	Lakshya - Gold	Assured Savings Insurance Plan
		-	Future Perfect	Savings Suraksha
	-	Smart Kid Plan (Smart Life)	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	
36 to 50	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
		Smart Couple Plan (Smart Life)	Guaranteed Wealth Protector	Lakshya Wealth
		Smart Kid Plan (Smart Life)	Lakshya Wealth	Lakshya Lifelong Income
		-	Lakshya Lifelong Income	Lakshya - Income
		-	Lakshya - Income	Lakshya - Gold
		-	Lakshya - Gold	Assured Savings Insurance Plan
		-	Future Perfect	Savings Suraksha
	-	Easy Retirement	Cash Advantage	
	-	Smart Kid Plan (Smart Life)	Future Perfect	
	-	-	Easy Retirement	
	-	-	Smart Kid Plan (Smart Life)	
Solutions**	Signature Insignia II	Signature Insignia	Signature Insignia II	
	Wealth Protection Solution III Aggressive	Signature Secure Income	Signature Insignia	
	Bhavishya Nidhi II	Bhavishya Nidhi II	Second Innings	
	Signature Insignia	Retire Secure	-	
	-	-	-	
51 to 59	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	Guaranteed Wealth Protector	Lakshya Wealth
		-	Lakshya Wealth	Lakshya Lifelong Income
		-	Lakshya Lifelong Income	Lakshya - Income
		-	Lakshya - Income	Lakshya - Gold
		-	Lakshya - Gold	Assured Savings Insurance Plan
		-	Future Perfect	Savings Suraksha
	-	Easy Retirement	Cash Advantage	
	-	Immediate Annuity	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	-	
	-	-	-	
60 and above	Products	Immediate Annuity	Immediate Annuity	Immediate Annuity
		Pru1 Wealth	Easy Retirement	Easy Retirement
		-	Pru1 Wealth	Pru1 Wealth
		-	-	-

**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 Aggressive	Life Time Classic & iProtect Smart
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

Date :

Signature of Agent / Intermediary / Official

Date :