Group Superannuation Scheme - Claim Intimation Form
Policy Number:
Type of Claim (please tick one) : Normal Retirement / Early Retirement / Resignation/ Death
Name of the member :
(In case of death claim, please attach the death certificate along with this form) : DD MM YYYY Details of Withdrawal of units: (Only in case of Defined Benefit Superannuation Schemes):
Plan Withdrawal (%) basis
Group Short Term Debt Fund
Group Debt Fund
Group Balanced Fund
Group Growth Fund
Group Capital Guarantee Short Term Debt Fund
*Please tick the appropriate option below (the options are governed by the Rules of the Scheme) :
A. (i) % of value of units to be utilized for immediate pension through ICICI PruLife
A. (ii) \square ————— % of value of units to be paid in lump sum (commutation)
Specify name of Payee for payment
B. Open Market Option ** Or Transfer to the new Fund***
Specify name of insurance company / new fund for payment C. Details of Beneficiary in case the claim is arising due to death
Full Name of the Beneficiary :
Full Name of the bank
Date of Birth : DD MM YYYY Gender : Male Female
Specify age proof (Please attach with this form) :
🗌 Birth cert 🔲 School / College extract 🗌 Passport 🗌 Employer's certificate for PSU/Govt company/Public Ltd company
Details for immediate pension where option chosen is A (i) :
First name Last name Last name First name A/C no.
Date of Birth : DD MM YYYY Gender : D Male Female
Frequency of pension payment : 🗌 Monthly 🗋 Quarterly 📋 Half yearly 📋 Yearly
Annuity Options (Please tick the appropriate box) :
 Life annuity □ Life annuity with return of Purchase Price □ Joint life last survivor (JLSS) without return of Purchase price □ Joint life last survivor (JLSS) with return of Purchase price □ Life annuity guaranteed for 5 years and life thereafter □ Life annuity guaranteed for 10 years and life thereafter □ Life annuity guaranteed for 15 years and life thereafter (JLSS option is applicable only when annuitant has spouse at time of commencement of pension.) Address for communication:
In case of JLSS policy :
Name of the spouse :
Date of birth of spouse : : .
Please provide the details of beneficiary except where the option is Annuity without return of purchase price:
Full Name of the beneficiary for payment , if any, on annuitant's death : Image: State of the beneficiary for payment , if any, on annuitant's death : Image: State of the beneficiary for payment , if any, on annuitant's death : Image: State of the beneficiary for payment , if any, on annuitant's death : Image: State of the beneficiary for payment , if any, on annuitant's death : Image: State of the beneficiary for payment , if any, on annuitant's death : Image: State of the beneficiary for payment , if any, on annuitant's death : Image: State of the beneficiary for payment , if any, on annuitant's death : Image: State of the beneficiary for payment , if any, on annuitant's death : Image: State of the beneficiary for payment , if any, on annuitant's death : Image: State of the beneficiary for payment , if any, on annuitant's death : Image: State of the beneficiary for payment , if any, on annuitant's death : Image: State of the beneficiary for payment , if any, on annuitant's death : Image: State of the beneficiary for payment , if any, on annuitant's death : Image: State of the beneficiary for payment , if any, on annuitant's death : Image: State of the beneficiary for payment , if any, on annuitant's death : Image: State of the beneficiary for payment , if any, on annuitant's death : Image: State of the beneficiary for payment , if any, on annuitant's death : Image: State of the

Relationship of Member with beneficiary :	
]
Details of the Appointee (who should be a major) whenever beneficiary is a minor :	
Full Name of the Appointee	
Relationship of appointee with beneficiary :	
Acceptance & Sign of Appointee	
We are aware that ICICI Prudential has a right to call for further information/documents for verification, including confirmation from the Truste	es.
Advance Discharge Voucher:	
We (name of the Trust) understand and agree that ICICI Prudential Life Insurance Company shall be discharged of all liabilities in relation to the above claim upon the payment of the Claim moneys in case of acceptance of the claim by the Company.	
Please affix Re. 1/- revenue stamp & sign across the stamp	
Stamp of the Trust :	
Signature of the authorized signatory	
Name of the signatory:	
Place : Date : Date: : Date: : Date	
 Instructions: The units to be withdrawn for the claim payment will be computed by using the NAV on the day of receipt of claim intimation or last requirement whichever is later. 	

- Applicable charges will be deducted from Payment.
- Eligibility to receive benefits must be confirmed by the Employer/Trust
- Eligibility to receive benefit, nature of benefit, and type of pension are governed by the Rules of the Scheme of the Trust.
- Pension will be paid always in arrears.
- Pension will be paid by an account payee cheque. However the Company has the right to introduce new modes of payment
- ICICI Prudential Life Insurance Company Ltd shall require survival proof from the Annuitant at least once a year
- The claim cheque would be dispatched to the last address recorded by us
- For any assistance kindly contact your Relationship Manager or write to us at <u>mysuperannuation@iciciprulife.com</u>
- ICICI Prudential Life Insurance Company shall be discharged of all liabilities in relation to the above claim upon receipt of claim amount by the payee mentioned above.

*ICICI Prudential shall process the claim on the basis of the information provided in this claim form without any verification as to the applicability and/or correctness of the same with the Trust Rules.

**ICICI Prudential Life Insurance Company Ltd will not be responsible for completing the formalities / documentation or any other requirement in case the annuitant opts for purchase of annuity from other insurance company under "open market option".

***Payment will be made in favor of the insurance company opted by the annuitant for purchase of annuity or shall be transferred to such approved fund, as opted by the member.



ICICI Prudential Life Insurance Company Ltd., Group Service Desk, 4th Floor, Stanrose House, Appasaheb Marathe Marg, Prabhadevi, Mumbai - 25.