

DETAILS OF IMMEDIATE PENSION WHERE OPTION CHOSEN IS A (I)

Annuitant's Full Name

Salutation First Name Surname

Full Name of the bank: Branch:

A/C no.: Date of birth: Gender: Male Female

Specify age proof (Please attach with this form): Birth certificate Passport School College extract

Employer's certificate: PSU Govt company Public Ltd company

ANNUITY PAYMENTS:

Frequency of pension payment Monthly Quarterly Half yearly Yearly

ANNUITY OPTIONS - (Please tick the appropriate box)

- Life annuity
Life annuity with return of premium
Joint life last survivor (JLSS)
Joint life last survivor with return of Purchase price (JLSS)
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
Life Annuity with Return of 50% Purchase Price
Life Annuity with Return of 75% Purchase Price
Life Annuity with Return of Balance Purchase Price
Life Annuity Guaranteed for 5/10/15 years and payable for life thereafter
Life Annuity with Return of Purchase Price on Critical illness (CI) or Permanent Disability due to accident (PD) or Death
Life Annuity with annual increase of 5%
Joint Life, Last Survivor with Return of Purchase Price in parts

Address for communication:

City: State: Pincode:

Landline number: Mobile number:

Alternate Mobile number*:

Email id (Personal):

Name of the spouse (In case of JLSS Policy)

Salutation First Name Surname

Date of birth of spouse (in case of JLSS policy) Spouse Mobile number:

Spouse Email id:

Specify age proof of spouse (in case of JLSS policy) Birth certificate Passport School College extract (Please attach with this form)

Mode of Annuity payment: Regular Cheque PDC Electronic Credit* Annuity Card

*In case of Electronic Credit please provide the following details

1. MICR Code

2. IFSC Code

BANK DETAILS:

Bank Name: Branch:

Contact no of Bank Branch: STD

Your bank account no to which the annuity proceeds are to be credited to:

Please provide the details of beneficiary where the option is Annuity with return of purchase price:

Full Name of the beneficiary for payment if any on annuitant's death:

Salutation First Name Surname

Address for communication:

City: State: Pincode:

Landline number: Mobile number:

Alternate Mobile number*:

Date of birth: Email id:

*In case of JLSS Return of Purchase price only the beneficiary should be third person

Details of the Appointee (who should be a major) whenever beneficiary is a minor:

Full Name of the Appointee:

Salutation	First Name	Surname
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Relationship of appointee with beneficiary: _____

Date of birth:

D	D	M	M	Y	Y	Y	Y
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 Mobile number : _____

Email id: _____

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 Trustees.

Signature of the Employee: _____

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
₹ 1/- revenue stamp &
sign across the stamp

Stamp of the Trust:

Signature of the authorized signatory
Name of the signatory: _____

Place: _____

Date:

D	D	M	M	Y	Y	Y	Y
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Signature of the Member/Beneficiary: _____

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 the 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
- Submission Methods:** You can submit the form by any of these convenient methods :
 - By email** - Please submit the form online by logging into www.iciciprulife.com OR kindly submit the form to mysuperannuation@iciciprulife.com from the official email id of the authorized signatory.
 - By Fax** - Please fax the form to Group Service at fax no. 022 4038 8199
 - By Courier** - Please courier the form to :
ICICI Prudential Insurance Company Limited,
Group Service Desk,
Unit 1A & 2A, Raheja Tipco Plaza,
Rani Sati Marg, Malad (East),
Mumbai-400097.
- The claim cheque would be dispatched to the last address recorded by us
- For any assistance kindly write to us at mysuperannuation@iciciprulife.com
- 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.
- Investments are subject to market risks
- Insurance is the subject matter of the solicitation
- Tax benefits are as per the Income Tax Act, 1961, and are subject to amendments made thereto from time to time.

*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.

** As per IRDAI (IRDAI (Unit Linked Insurance Products) Regulations, 2019, currently 50%, of the entire proceeds of the policy net of commutation is permissible in case the annuitant opts for purchase of annuity from other insurance company under "open market option". ICICI Prudential Life Insurance Company Ltd will not be responsible for completing the formalities / documentation or any other requirement in this case.

***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 Limited. Registered Address: - ICICI PruLife Towers, 1089 Appasaheb Marathe Marg, Prabhadevi, Mumbai-400025. IRDAI Regn No. 105. CIN:L66010MH2000PLC127837. Call us on 1800-266-1999 (10am-7pm, Monday to Saturday, except national holidays and valid only for calls made from India). Trade Logo displayed above belongs to ICICI Bank Ltd & Prudential IP services Ltd and used by ICICI Prudential Life Insurance Company Ltd under license. Comp code: COMP/DOC/Jul/2024/117/6601.