



jeevan suraksha ka  
naya nazariya



Policy Number:

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FOR OFFICE USE ONLY

Received Date:

# Fund Switch, Premium Redirection and Top Up Form

## 1. I want to apply for top-up

I would like to pay an additional amount of ₹ \_\_\_\_\_  
(in words) towards Top-up Premium by (Tick as applicable)

<input type="checkbox"/> Cash	Denominations	1000 X =	500 X =	100 X =
		50 X =	20 X =	10 X =
		<b>TOTAL AMOUNT (₹)</b>		

Cheque  Demand Draft

Cheque / DD No.	Dated	Drawee Bank & Branch	Amount (In Figures)
			₹ _____

### What I need to know while giving my top up request?

- Cheque / DD should be made payable to "Bharti AXA Life Insurance Company Limited" • Should you choose to pay the Top-up Premium by cash you are advised to deposit the same at the nearest branch office of the Company. You are advised not to hand over cash to our sales representative. The Company shall not be held responsible for any risk/loss arising out of the customer handing over any money to sales representative other than branch offices of the Company.
- Kindly refer to the Policy Bond for details pertaining to composition of various funds and risk factors associated with them • Minimum allocation percentage in any fund (if chosen) is 5% • If the total allocation of all funds is not equal to 100%, then the form will be returned back to the Policyholder. In such a scenario, a fresh Top-up form will need to be filled to define a new allocation.
- This form should be filled up by the plan owner or the assignee • For details on Top-up limits, charges, entry years, etc., please refer your policy bond • If the above Top-up amount plus the aggregate premium payable in the financial year is equal or exceeds ₹ 2 lakhs (in case of regular premium Policy) and ₹ 1 lakh (in case of single premium Policy and NRI customers), then please enclose self-attested copies of the income. The income proof is not required to be submitted if it is provided earlier • If the above Top-up amount plus the aggregate premium payable in the financial year is equal or exceeds ₹ 50, 000, then please submit a photocopy of your PAN card or Form 16. The PAN card is not required to be submitted if it is provided earlier • The aforesaid Top-up Premium allocation instruction would not change the allocation for any earlier regular/Top-up Premium payment (if any)
- Top-up Premium will not be accepted if there is/are any unpaid regular premium/s • The Top-up amount will not change the Sum Assured under the Policy except for Bharti AXA Life - InvestConfident, where with every Top-up amount the Sum Assured will increase by 125% of the Top-up amount • Allocation of Top-up Premium is subject to Top-up allocation charges (if any). Please refer to your policy bond for more details • Please consult your Tax Advisor/Chartered Accountant/Financial Advisor for Top-up related taxation information
- Service tax and cess will be charged on Top-up allocation charge as per the prevailing tax rates • Insurance is the subject matter of the solicitation • Income proof is mandatory for Politically Exposed Persons • Top up premium will be allocated to your policy subject to realization of cheque/DD etc.

I want to allocate my top up premium as per below instructions (Choosing a fund is mandatory) (Total allocation across all funds = 100%)

Fund Name	Fund Allocation (%)
Grow Money Fund/Grow Money Pension Fund	
Save'n'grow Money Fund/Save'n'grow Money Pension Fund	
Steady Money Fund/Steady Money Pension Fund	
Growth Opportunities/Growth Opportunities Pension Fund	
Safe Money/Safe Money Pension Fund	
Build India Fund	
<b>Total</b>	<b>100%</b>

### Important Note:

- This form should be filled up by the plan owner or the assignee.
- Kindly fill details in BLOCK LETTERS only.
- This application will be effective only if it is notified to be accepted by Bharti AXA Life Insurance Company Limited.
- Changes would be considered only if the policy is in force.
- Investment in ULIPs is subject to market risk and in these policies the investment risk is borne by the policyholder.

## 2. I want to switch my fund investment

Switch of funds will be applicable to accumulated funds only and not for future premiums.

Switch from		Percentage switch to						Row total (i.e. Switch to total should be 100%)
Fund Name	% of current allocation to be switched out	Grow Money	Steady Money	Build India Fund	Save 'n' grow Money	Safe Money	Growth Opportunities	
Grow Money*								100%
Steady Money*								100%
Build India Fund								100%
Save 'n' grow Money*								100%
Safe Money*								100%
*Growth Opportunities*								100%
Total								100%

### What I need to know while switching my funds?

#### Fund Switching

refers to change of funds units from existing Investment Fund to new choices of fund(s). This does not impact future premium allocation • Switch of funds will be effected at a Unit price declared on the date the request is received and accepted at the Company's office before 3 p.m., and on the next Unit price declared if the request is submitted and accepted at the Company's office after 3 p.m. • A fixed number of switches are free per policy year. For details on switch, please refer to Policy Bond terms and conditions • The total percentage allocation premium should add up to 100% and minimum allocation for each investment fund to be switched to should be 5% • The minimum amount that can be switched out of fund is ₹2500/- or total Unit value in that fund • For policies issued after Jan 1, 2010, the minimum amount that can be switched out of fund is ₹1000/- or total Unit value in that fund.

\*Topup Premium will be allocated to your policy subject to realisation of cheque/DD etc.

I want my future premiums to be allocated based on my fund switch instruction.

## 3. My fund allocation instruction

Investment fund name	Allocation percentage (%)
<b>Total</b>	<b>100%</b>

### What I need to know on changing my fund allocation?

#### Premium redirection

refers to change of instruction of fund investment on all future premiums • Premium redirection will be effective from the next premium due date and not from the day of acceptance of redirection form • Change of allocation will not apply to top-up premiums (if any) • The total percentage allocation premium should add up to 100% and minimum allocation for each investment fund to be redirected to should be 5% • Kindly refer to the Policy Bond for details pertaining to composition of various funds and risk factors associated with them

## Declarations and agreement

I hereby understand and agree with all the instruction given herein above

Name of Policyholder/Assignee  Signature  Signature date

Are you a US Citizen or US tax resident  Yes  No If Yes, Please provide TIN: \_\_\_\_\_

## Vernacular Declaration

### DECLARATION\* IN CASE THIS FUND SWITCH/PREMIUM REDIRECTION FORM IS FILLED BY A PERSON OTHER THAN THE POLICYHOLDER OR SIGNED IN VERNACULAR LANGUAGE:

#### Declaration by Policyholder:

I hereby declare that the contents in the form have been fully explained to me and I declare that whatever is stated hereinabove has been recorded as per the information provided by me.

Thumb Impression/Signature of the Policyholder

Name of Policyholder:

#### Declaration by person filling the form:

I have explained the contents of this form to the Policyholder in \_\_\_\_\_ language and I have correctly recorded the answer provided to me. I further declare that the Policyholder has signed/affixed his/her thumb impression in my presence.

Declarant's Name:

Declarant's Address:

City  State  Pin Code

Date of Birth:

Declarant's Signature:  Date:  Place: \_\_\_\_\_

\*\*The person giving this declaration can be any person other than Introducing Advisor or MOA or MOM\*

**Bharti AXA Life Insurance Company Ltd.**

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1800-102-4444

SMS SERVICE to 56677 We will be in touch within 24 hours to address your query

www.bharti-axalife.com