



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 =
<input type="checkbox"/> Cheque	<input type="checkbox"/> Demand Draft	<b>TOTAL AMOUNT (₹)</b>		

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 1.25% 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	
Stability Plus Money Fund (applicable only for Bharti AXA Life Grow Wealth Product)	
<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.

