

## POLICY SERVICING REQUEST FORM 2

~~(Excess Refund, Free Look Cancellation, Withdrawal of Proposal / Policy, Stop Payment and Reissue)~~

**(This format is to be used for Life and Health policies.)**

<p><i>For office use only</i></p> <p>Branch Name: _____</p> <p>Receipt by: _____</p> <p>Interaction ID: _____</p> <p>Date &amp; Time: _____</p>	<p>Current Day NAV <input type="checkbox"/></p> <p>Next Day NAV <input type="checkbox"/></p> <p>Employee Code: _____</p> <p>Signature: _____</p>
---	--



Name of the Policyholder : RANJITH J (First Name) (Middle Name) (Last Name)

[illegible]

### Excess Refund

Please refund the excess premium of INR \_\_\_\_\_ held in my policy.

✓ **Free Look Cancellation**

Free look on my policy is executed for:

☐ Change of Plan\* ☒ Cancellation and refund in of full Policy

### Option A - All Riders

**Option B - Specific Riders; Please specify**

Reason: Financial Problem.

New application No.: \_\_\_\_\_

I hereby confirm that I received Policy document on \_\_\_\_\_ within ☐ 15 days ☐ 30 days, to enable you to consider this request and refund the premium paid by me after deducting the free look charges.

NOTE : As per IRDAI guidelines, the cut off timings for NAV application and redemption of units stands revised to 3pm IST with effect from June 1, 2007. This implies that if the application for free look cancellation (unit linked) is received up to 3pm IST on a working weekday (Mon-Fri), the same day's unit value will be applicable. However, if the application for free look cancellation (unit linked) is received after 3pm IST on a working weekday, then the next working day's value will be applicable (when the applicable day is not a valuation day, NAV of the next immediate valuation day would be considered). Any fluctuations in NAV as a result of free look will be borne by Policyholder. The same is subject to changes as and when amended by IRDAI. In case a prior unit allocation is pending, your current request will be processed on the successive working day. For policies bought (wholly or partially) through QROPS Transfers, Pension Vesting Base, NPS Transfers and Group Superannuation Policies, refund to customer shall be guided by the regulatory guidelines.

\* For change of Plan please submit a fresh proposal form.

### Withdrawal of Proposal / Policy

I wish to withdraw my proposal for the reason(s) mentioned below :

☒ Financial Reasons (Financial Crunch, Purchase of Asset, Etc) ☐ Personal Reasons (Marriage, Education, Death etc)

☐ Unsatisfactory Returns ☐ Change in Plan\* ☐ Others (Please specify): \_\_\_\_\_

\* For change of plan, provide the new application No. \_\_\_\_\_

NOTE: For policies bought (wholly or partially) through QROPS Transfers, Pension Vesting Base, NPS Transfers and Group Superannuation Policies, refund to customer shall be guided by the regulatory guidelines

### Premium Payment Mode

☐ Online ☒ Credit Card ☐ NEFT

If the initial payment is received through credit card then submit the credit card mandate . We will process the refund via credit card / online only if the payment have been received within 6 months.

Customer Acknowledgement Copy - ☐ Excess Refund ☒ Free Look Cancellation ☐ Withdrawal of  
Proposal/Policy ☐ Stop Payment and Reissue / Only Stop Payment

Policy No: 22839634 Interaction ID No: \_\_\_\_\_ Policyholder name: \_\_\_\_\_

Documents accepted: ☐ Original Policy Document ☐ Policy document waiver form ☐ NEFT

Branch Stamp

Customer Relations Officer:      Date:      Time:

For queries or more information, call us on **1860-267-9999** (local charges apply). DO NOT prefix any country code e.g. +91 or 00. Available on Mon-Sat from 10 am to 7 pm | Email - [support@hdfclife.com](mailto:support@hdfclife.com) | [nri@hdfclife.com](mailto:nri@hdfclife.com) (For NRI customers only) | Visit - [www.hdfclife.com](http://www.hdfclife.com)



☐ Stop Payment and Reissue☐ Only Stop Payment

I request you to do a stop payment for cheque number \_\_\_\_\_ dated \_\_\_\_\_ for an amount of INR \_\_\_\_\_.

Reason for stop payment & reissue: ☐ Cheque date expired ☐ Lost in transit ☐ Change in name\* (please provide the old and new names)

Others (Please specify): \_\_\_\_\_

\*Old Name: \_\_\_\_\_ New Name: \_\_\_\_\_

Valid address and ID proof (if cheque date is more than one year).

I would like to opt for the payout via ☐ Cheque ☐ NEFT (Please fill the attached NEFT mandate)

I have understood the meaning and scope of the service request form and take complete responsibility for the service request given by me.

Policyholder/ Assignee Name: RANJITH JPlace: MADURAI

Policyholder signature:

Assignee signature:

Date: 13-08-2020J. Ranjith

Signature Verified Stamp

**Tax Declaration for the current financial year (except for Excess Refund, Free Look Cancellation or Withdrawal of proposal)**1. Are you a tax resident of any country other than India as per the Income-tax Act, 1961? Yes\*\* ☐ No\* ☐

\*To be ticked if you are a tax resident in India under the Income-tax Act, 1961.

\*\*If you are a non-resident in India as per the Income Tax Act, 1961, you are mandatorily required to submit Tax Residency Certificate (TRC) with Form 10F to avail treaty benefits, otherwise tax will be deducted at source at a higher rate from policy payouts. As per section 195 of the Income-tax Act, 1961, tax will be deducted at source from any payout to a non-resident at the rate applicable therein and subject to the conditions specified therein. Tax laws are subject to change.

2. Is your total taxable income for the current financial year (April 1 to March 31):

a) Less than or equal to INR 50 lakhs? ☐ b) Greater than INR 50 lakhs but less than or equal to INR 1 crore? ☐ c) Greater than INR 1 crore? ☐3. Self-attested documents submitted: ☐ TRC ☐ FORM 10F**NOTE**

- Taxes will be deducted at source, if applicable, from the payments made under a life insurance policy in accordance with the provisions of the Income-tax Act, 1961. Tax laws are subject to change from time to time.
- With reference to recent regulatory changes, please submit PAN or Form 60 (if you do not have a PAN) with HDFC Life with immediate effect. Please update via My Account/service@hdfclife.com/18602679999/HDFC Life branch. Ignore if submitted.
- In the event of a free lookin cancellation of an annuity plan purchased from proceeds of a pension policy issued by HDFC Life, only 'Change of Annuity' option can be availed. The corpus cannot be withdrawn as a lump sum amount.

**Third Party Declaration**

The person who has affixed his/her thumb impression or has signed in vernacular/ has not filled this application form. I hereby declare that the content of this application form has been explained to him/ her and I have truthfully recorded the answers provided to me. I further declare that the said person has signed or affixed his/her thumb impression in my presence.

Name: \_\_\_\_\_

Address: \_\_\_\_\_

Date: DD/MM/YYYY Place: \_\_\_\_\_

SIGN HERE

Signature of Third Person

HDFC Life Insurance Company Limited [Formerly HDFC Standard Life Insurance Company Limited] (HDFC Life). IRDAI Registration No 101.

Regd. Off: 13th Floor, Lodha Excelus, Apollo Mills Compound, N.M. Joshi Marg, Mahalaxmi, Mumbai - 400 011.

CIN: L65110MH2000PLC128245.

View Premium Calendar, Pay Premium Online,  
Track fluctuations in the fund value, Print your  
Annual Premium Statement & lots more!  
Visit [www.hdfclife.com](http://www.hdfclife.com) and register for  
My Account today!

Call 1860-267-9999 (local charges apply). DO NOT prefix  
any country code e.g. +91 or 00. Available Mon-Sat from  
10 am to 7 pm | Email - [service@hdfclife.com](mailto:service@hdfclife.com) |  
[nriservice@hdfclife.com](mailto:nriservice@hdfclife.com) (For NRI customers only)  
Visit - [www.hdfclife.com](http://www.hdfclife.com)

**HDFC Life**  
Sar utha ke jiyo!



**NEFT Mandate**☐ IF NEFT is already submitted, Pls do not fill in below details☒ Please fill in the details on the NEFT Mandate portion in this form for direct transfer of payouts into your bank account through the NEFT facility.

In case of Unit Linked Young Star or Children's plan, if the beneficiary is major, please provide beneficiary's account details.

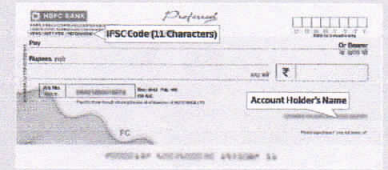
Bank Account No.: 50100342527347

Account Holder Name: RANJITH J

Bank Name &amp; Branch: HDFC BANK, THALLAKULAM

Account Type: ☒ Savings ☐ Current ☐ NRE ☐ NRO

IFSC Code^: HDFC0004691 ^11 character code appearing on your cheque leaf

**NOTE:**

- A cancelled personalised cheque with account no. and IFSC code should be submitted along with this NEFT Mandate. Where the cheque is not personalised, a latest bank statement (not more than 3 months old) or copy of passbook (where account number and IFSC code is mentioned needs to be submitted with the mandate.
- This mandate, upon processing, will override any of the previously tagged NEFT Mandates for all policies, held by the client with HDFC Life.
- In case of NEFT failure or any further requirements pending on the mandate, payout will be kept on hold till a fresh NEFT mandate is received. Intimation regarding the same will be sent to you.

**Declaration:**

I undertake to refund any amount that is credited to my account either in excess or which is not due to me, at anytime, for any reason and to this effect, I confirm that the particulars given here are true, correct and complete in all aspects. I understand and agree that the submission of this form does not mean that the request will be processed. I understand that any payout under the policy shall be strictly in accordance with the policy terms and conditions. Also, any payment shall be subject to realisation of the last renewal premium payment. Further, I understand that the company shall not be held responsible for any non-receipt of payment on account of wrong/incorrect/incomplete information given by me in this form. If a transaction is delayed or has not come into effect at all, due to incomplete or incorrect information, I shall not hold the company responsible in any manner whatsoever.

Account Holder Signature: J. Ranjith Date: 13-08-2020 Place: MADURAI**HDFC Life Insurance Company Limited [Formerly HDFC Standard Life Insurance Company Limited] (HDFC Life). IRDAI Registration No 101.**

Regd. Off: 13th Floor, Lodha Excelus, Apollo Mills Compound, N.M. Joshi Marg, Mahalaxmi, Mumbai - 400 011.

CIN: L65110MH2000PLC128245.

View Premium Calendar, Pay Premium Online,  
Track fluctuations in the fund value, Print your  
Annual Premium Statement & lots more!  
Visit [www.hdfclife.com](http://www.hdfclife.com) and register for  
My Account today!

Call **1860-267-9999** (local charges apply). DO NOT prefix  
any country code e.g. +91 or 00. Available Mon-Sat from  
10 am to 7 pm | Email - [service@hdfclife.com](mailto:service@hdfclife.com) |  
[nriservice@hdfclife.com](mailto:nriservice@hdfclife.com) (For NRI customers only)  
Visit - [www.hdfclife.com](http://www.hdfclife.com)

**HDFC Life**  
Sar utha ke jiyo!



## Policy Document Waiver Form

## Declaration by the Policyholder

I/We,

Life assured 01: RANJITH J Age: 30 (yrs)Current Address: 34/8 SETHUPATHI NAGAR, THIRUPPUVANAM, SIVAGANGA, TAMIL NADU

Life assured 02: \_\_\_\_\_ Age: \_\_\_\_\_ (yrs)

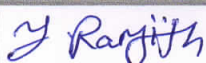
Current Address: \_\_\_\_\_

is/are the Policyholder(s) under insurance Policy number 22839631 issued on 05-08-20 (referred to as "the Policy Document") by HDFC Life Insurance Company Limited (referred to as "the Company").Type of Request  
(Tick correct option)Surrender ☐Maturity ☐Look-in ☒


I/We hereby:

- Submit the above selected request in the prescribed form, without the Policy Document issued by the Company.
- Agree that the Policy Document will be treated as cancelled hereafter. Neither I/ my legal heir/ beneficial owners nor any third party will present the Policy Document in the future for payments or entitlements.
- Confirm that I/ We have not assigned, pledged or in any way disposed off or dealt with the Policy Document nor have I/We created any encumbrance on the Policy Document.
- Confirm that I/ We or my/ our legal heir or any third party will not assign or pledge the Policy Document or make any misrepresentation or commit any fraud in connection with the Policy Document at any time after the date of this declaration.
- Agree that after processing this request, the Policy Document and my/ our rights created under the Policy Document stand null and void.
- Agree that the Company shall not be liable for the payment of any benefits against the Policy Document once this request is processed.
- Agree to cooperate with the Company in case of any enquiry/ investigation that may be initiated by the Company in connection with the Policy Document.
- Declare that the Company is discharged off all its liabilities mentioned in the Policy Document and I/ We relinquish any further claim on the Company once this request is processed.
- Shall not hold the Company accountable for any loss incurred by me/ us due to processing of my/ our request by the Company.
- Agree to indemnify/defend and hold harmless the Company and its officers, directors, employees, representatives, agents, against all claims, demands, actions, suits, proceedings, losses, damages, liabilities, costs, charges, expenses (including legal expenses) or obligations, which may be brought or commenced against the Company, relating to the Policy Document.

SIGN HERE

Signature  
(Life assured 01)

SIGN HERE

Signature  
(Life assured 02)Date of Declaration: 13-08-20Place: MADURAI

## Declaration made by third party where the Policyholder has affixed his/ her thumb impression/ has signed in vernacular:

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

Name: \_\_\_\_\_ Date: DD/MM/YYYY Place: \_\_\_\_\_

Signature: \_\_\_\_\_ Address: \_\_\_\_\_

HDFC Life Insurance Company Limited [Formerly HDFC Standard Life Insurance Company Limited] (HDFC Life).

CIN: L65110MH2000PLC128245. IRDAI Registration No. 101.

Regd. Off: 13th Floor, Lodha Excelus, Apollo Mills Compound, N.M. Joshi Marg, Mahalaxmi, Mumbai - 400 011.

For queries or more information, Call **1860-267-9999** (local charges apply). DO NOT prefix any country code e.g. +91 or 00. Available Mon-Sat from 10 am to 7 pm.]Email - [service@hdfclife.com](mailto:service@hdfclife.com) | [nriservice@hdfclife.com](mailto:nriservice@hdfclife.com) (For NRI customers only) Visit - [www.hdfclife.com](http://www.hdfclife.com)

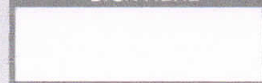
## Declaration by Branch Official

I confirm that Policyholder has signed or affixed his/ her thumb impression in my presence.

Employee ID: \_\_\_\_\_ Employee Name: \_\_\_\_\_


Branch Code: \_\_\_\_\_ Branch Name: \_\_\_\_\_

SIGN HERE



Employee Signature



 <p><b>இந்திய அரசாங்கம்</b> Government of India</p>  <p>ஜெ ரஞ்சித் J RANJITH பிறந்த நாள்/ DOB: 24/07/1990 ஆண் / MALE</p>  <p><b>8266 3235 5716</b></p> <p>எனது ஆதார், எனது அடையாளம்</p>	 <p><b>இந்திய தனிப்பட்ட அடையாள ஆணைய அமைப்பு</b> Unique Identification Authority of India</p> <p><b>முகவரி:</b> ஜெயேந்திரன், 34/8, சேதுபதி நகர், வேலம்மாள் பள்ளி பின்புறம், திருப்புவனம், சிவகங்கை, தமிழ் நாடு - 630611</p> <p><b>Address:</b> S/O, Jeyendran, 34/8, Sethupathi Nagar, Behind Velammal School, TIRUPPUVANAM, Sivaganga, Tamil Nadu - 630611</p> <p><b>8266 3235 5716</b></p> <p>1947</p> <p>help@uidai.gov.in</p> <p>www.uidai.gov.in</p>
--	---

*J. Ranjith.*  
*13-08-20.*

<p><b>आयकर विभाग</b> INCOME TAX DEPARTMENT</p> <p><b>भारत सरकार</b> GOVT. OF INDIA</p> <p>J RANJITH JEYENDRAN 24/07/1990</p> <p>Permanent Account Number BIDPR3309B</p> <p><i>J. Ranjith.</i> Signature</p> 	<p><i>In case this card is lost / found, kindly inform / return to :</i> Income Tax PAN Services Unit, UTITSL, Plot No. 3, Sector 11, CBD Belapur, Navi Mumbai - 400 614.</p> <p><i>इस कार्ड के खोने/पाने पर कृपया सूचित करें/ लौटाएं :</i> आयकर पैन सेवा यूनिट, एन सी सी आई एम एस, प्लॉट नं: 3, सेक्टर 11, एन.सी.डी.बेलापुर, नवी मुंबई-400 614.</p>
--	--

*J. Ranjith.*  
*13-08-20.*



MR RANJITH J  
34/8 SETHUPATHI NAGAR  
BEHIND VELAMMAL SCHOOL  
TIRUPPUVANAM  
SIVAGANGA-630611  
TAMIL NADU INDIA  
JOINT HOLDERS :

Nomination : Registered

Account Branch : THALLAKULAM  
Address : OLD NO: 11/11A, NEW NO: 2/4  
FIRST FLOOR, KAMALA 1ST STREET,  
CHINNA CHOKKIKULAM, THALLAKULAM POST  
City : MADURAI 625002  
State : TAMIL NADU  
Phone no. : 9840673333  
OD Limit : 0.00  
Currency : INR  
Email : RANJITH12ECE@GMAIL.COM  
Cust ID : 138164441  
Account No : 50100342527347 OTHER  
A/C Open Date : 28/06/2020  
Account Status : Regular  
RTGS/NEFT IFSC : HDFC0004691 MICR : 625240012  
Branch Code : 4691 Product Code : 105

From : 01/07/2020

To : 29/07/2020

## Statement of account

Date	Narration	Chq./Ref.No.	Value Dt	Withdrawal Amt.	Deposit Amt.	Closing Balance
02/07/20	50200019322061-TPT-JUNE 2020.SALARY-ASAR AA SOFTWARE SOLUTIONS OPC PRIVATE LI	0000000162525590	02/07/20		26,190.00	26,190.00
08/07/20	NWD-541919XXXXXX6504-BNA26201-SIVAGANGA	0000019018365413	08/07/20	10,000.00		16,190.00
08/07/20	NWD-541919XXXXXX6504-TMB26202-SIVAGANGA	0000019018366541	08/07/20	10,000.00		6,190.00
08/07/20	NWD-541919XXXXXX6504-BNA26201-SIVAGANGA	0000019018365413	08/07/20	-10,000.00		16,190.00
12/07/20	IMPS-019419198774-RANJITH CANARA-CNRB-XX XXXXXXXX0273-NIVI	0000019419198774	12/07/20	15,000.00		1,190.00
16/07/20	IMPS P2P 019419198774#12/07/2020 130720 -MIR2019839205237	MIR2019839205237	16/07/20	5.90		1,184.10
20/07/20	INST-ALERT-CHG-INC GST APR-JUN2020-MIR20 20049434595	MIR2020049434595	20/07/20	17.70		1,166.40

## STATEMENT SUMMARY :-

Opening Balance  
0.00

Dr Count  
6

Cr Count  
1

Debits  
25,023.60

Credits  
26,190.00

Closing Bal  
1,166.40

Generated On: 30-Jul-2020 17:48

Generated By:  
138164441

Requesting Branch Code: NET

*J. Ranjith.*  
*13-08-20.*

This is a computer generated statement and does  
not require signature.

## HDFC BANK LIMITED

\*Closing balance includes funds earmarked for hold and uncleared funds

Contents of this statement will be considered correct if no error is reported within 30 days of receipt of statement. The address on this statement is that on record with the Bank as at the day of requesting this statement.

State account branch GSTIN:33AAACH2702H1Z7

HDFC Bank GSTIN number details are available at <https://www.hdfcbank.com/personal/making-payments/online-tax-payment/goods-and-service-tax>.

Registered Office Address: HDFC Bank House, Senapati Bapat Marg, Lower Parel, Mumbai 400013