

Life Insurance

Aditya Birla Sun Life Insurance Company Ltd.



ADITYA BIRLA CAPITAL

PROTECTING INVESTING FINANCING ADVISING

NRI/FNIO/PIO QUESTIONNAIRE

Application No: Client ID: Form ID:
 Policy Number 1: Policy Number 2:
 Owner Insured (If owner & insured both are NRI, a separate NRI questionnaire is required for both)

Personal details:

Name:
 Father Name:
 Nationality: Indian Other (Specify) _____
 Country of Birth: Indian Other (Specify) _____
 Are you of Indian Origin: Yes No
 Country of Permanent residence: Indian Other (Specify) _____
 Date from which you become a permanent resident of Country mentioned above
 Country of Current residence: Indian Other (Specify) _____
 Date of recent visit to India: Passport No.:

Help us know you better! For which financial goal did you choose your life insurance Policy?

For Your Family & You

- Childs Education
- Childs Marriage
- Family Protection & Risk
- Protection against Health
- Cover Outstanding Loans

For Efficient Financial Planning

- Saving
- Wealth Creation
- Tax planning
- Business Continuity

For Your Aspirations

- Wealth Creation
- Retirement Planning
- Legacy Planning

FINO/PIO

Do you Stay in India? Yes No (If Yes pls answer below):
 a) Duration of your Stay in India: Years Month
 b) Nature of VISA held:
 c) Purpose of your Stay In India: Student Gainful employment Business Others (Specify Reason): _____

Other Details:

Residence Address 1 Area:
 address while in India Address 2 City/Town/Village:
 (Pincode mandatory) Address 3 State:
 Picode: Email:
 Purpose of your stay abroad: Student Gainful employment Business Others (Specify Reason): _____
 If you are a student, state the nature and details of your studies abroad: _____
 Intended duration of stay abroad: Years Month
 Type of address: Residential/business Residential Business Registered office
 Your full address while Address 1 Area:
 abroad (Please Address 2 City/Town/Village:
 mention pincode/ Address 3 State:
 zipcode if applicable) Picode: Email:
 Email ID:
 Telephone Numbers: Residence Office Mobile:

Tax Details of other countries

Are you holding citizenship of any other country? Yes No If yes, please provide details below
 Are you a tax resident of any other country? Yes No If yes, please provide details below

| Country# | Tax Identification Number% | Identification Type (TIN or Other %, please specify) |
|----------|----------------------------|--|
| | | |
| | | |
| | | |

#To also include USA, where the individual is a citizen/greencard holder of USA %In case Tax Identification Number is not available, kindly provide functional equivalent \$

Please collect stamped, signed and duly filled acknowledgement slip, which you can refer to for all your communication in regard to this request.

Bank details:

Do you have an NRI Account Yes No If yes, please furnish following details

Type of Account (from which premium is paid) NRE NRO FCNR

Bank Name:

Bank Account Number: 9 digit MICR code:

IFSC code:

Exchange Details

Exchange facility availed Yes No

RBI permit no and details

Name of RBI office which granted above facilities

Payment Details:

Please indicate the manner in which you propose to remit the premium to Aditya Birla Sun Life Insurance Company Ltd.

By Cheques drawn on any Indian Rupee Account of Policy Owner

NRE/NRO/FCNR Bank Account of the Policy Owner

(In case of this option, Electronic Clearing Service method will have to be opted for payment of renewal premiums)

Any other, please specify

As per the current exchange control regulations, settlement of rupee life insurance policies in favour of claimants resident outside India in foreign currency is permitted only in proportion of the amount of premia paid in foreign currency in relation to the total premia payable.

Declaration

I hereby declare that the foregoing statements and answers are true in every respect and I am agreeable for treating this as a part of the Original Application form. I agree that repatriation of all payments/settlements/claims/maturities etc. will be in INR only and will be as per the exchange control regulations prevailing from time to time in India and subject to withholding tax if any, prevailing from time to time.

I have understood the information requirements of this form (read along with the relevant Instructions pertaining to CRS/FATCA) and hereby confirm that the information provided by me on this Form is true, correct, and complete.

I agree to provide documents and information including bank statements as may be required from time to time for claims, compliance and statutory purposes by ABSLI. I agree that any change in my residential status, payment details and other details will be communicated to ABSLI immediately on change but not later than 10 days of such change.

Signature of the Policy Owner _____

Signature of the Life to be insured _____

(This is required on at the time of New Application)

Witness _____

Address _____

Name _____

Signature _____

Date:

FATCA-CRS Instructions

Details under FATCA/Foreign Tax Laws: Towards compliance with tax information sharing laws, such as FATCA and CRS, we would be required to seek additional personal, tax and beneficial owner information and certain certifications and documentation from our account holders. Such information may be sought either at the time of account opening or any time subsequently. In certain circumstances (including if we do not receive a valid self-certification from you) we may be obliged to share information on your account with relevant tax authorities. If you have any questions about your tax residency, please contact your tax advisor. Should there be any **change in any information provided by you, please ensure you advise us promptly, i.e., within 10 days.** Towards compliance with such laws, we may also be required to provide information to any institutions such as withholding agents for the purpose of ensuring appropriate withholding from the account or any proceeds in relation thereto. As may be required by domestic or overseas regulators/ tax authorities, we may also be constrained to withhold and pay out any sums from your account or close or suspend your account(s).

If you are a US citizen or resident or greencard holder, please include United States in the foreign country information field along with your US Tax Identification Number. Foreign Account Tax Compliance provisions (commonly known as FATCA) are contained in the US Hire Act 2010.

[§]It is mandatory to supply a TIN or functional equivalent if the country in which you are tax resident issues such identifiers. If no TIN is yet available or has not yet been issued, please provide an explanation and attach this to the form.

Please note that you may receive more than one request for information if you have multiple relationships with ABSLI or its group entities. Therefore, it is important that you respond to our request, even if you believe you have already supplied any previously requested information.

