

Life Insurance

Aditya Birla Sun Life Insurance Company Ltd.



ADITYA BIRLA CAPITAL

PROTECTING INVESTING FINANCING ADVISING

Top Up Form

Any alterations/corrections made in the form need to be duly signed by the policy owner. Tick (✓) the relevant box Kindly fill in BLOCK LETTERS ONLY

Policy / Application Number:

e-Insurance Account Number (If Yes):

Name of the Policy Owner (Mandatory): _____

Current Address (Mandatory): _____

District: _____ City: _____ State: _____ Pincode:

Tel. No. (R/O): Mobile No. (Mandatory): Email Id: _____

Kindly note, this email id will be used for registration of 'Go Green' and will lead to discontinuance of physical statements.

Top Up Payment Details

a. Amount paid ₹: Cash Cheque/DD ₹ In words: _____

b. Payment details: Cheque/DD No.: Date: Drawee Bank & Branch: _____

c. PAN (Mandatory): or From 60/61

1. Are you holding citizenship of any other country? Yes No If yes, please provide country name/s: _____

2. Are you a tax resident of any other country? Yes No If yes, please provide unique Tax Identification Number/s: _____

Note: If the response to any of the above questions is yes, please submit a detailed NRI questionnaire available with our branch office.

Income Proof (any one): (Mandatory only if the annual contribution is equal to or more than ₹1,00,000/-)

- | | | |
|--|--|---|
| <input type="checkbox"/> Income Tax Assessment Orders / Income Tax Returns | <input type="checkbox"/> Form 16 / Salary Slip (electronic accepted) | <input type="checkbox"/> Pass-Book |
| <input type="checkbox"/> Agricultural Land Details & Income Assessments | <input type="checkbox"/> Chartered Accountant's Certificate | <input type="checkbox"/> Employer's Certificate for Income* |
| <input type="checkbox"/> Bank Cash-Flow Statements | <input type="checkbox"/> Audit Account of Proprietorship Firm | <input type="checkbox"/> Others <u>Specify</u> _____ |

I understand that, if the total sum assured under this policy (including the additional cover, if any, created for the top up) is less than 10 times of the total annual premium payable including the Top up amount, the policy will not be eligible under Sec 10(10D) as per Income Tax Act 1961 and will be liable to TDS.

I hereby provide my consent to receive a call with regards to my request as given herein.

Signature of the Policy Owner / Assignee _____ Date: Place: _____

Please collect stamped, signed and filled up acknowledgment slip, which you can refer to for all your communications in regard to this request.

Are you a PEP# (Politically Exposed Person) Yes No

PEP: "Individuals who are or have been entrusted with prominent public functions domestically or by a foreign country or by an international organization, for example Heads of State or government, senior politicians, senior government, judicial or military officials, senior executives of state-owned corporations and important politically party officials OR Family members /close associates who are related or have business relationships with PEP's"

If yes, please provide complete details of your role, function along with date of assuming this role and function. _____

Please read all instructions before signing the form:

- Please refer to your "Policy Contract" for details on charges/minimum and maximum amount of Top Ups.
- A copy of the PAN to be provided if the annual contribution is equal to or more than ₹50,000/-.
- A copy of a valid income proof to be provided if the annual contribution is equal to or more than ₹1,00,000/-.
- For all ULIP policies - Payment will be considered as Top Up only if all the annualized premiums due on the policy are received by (Aditya Birla Sun Life Insurance Company Limited ABSLI).
- ULIP Policies issued between July 01, 2006 and August 30, 2010 - The amount of top up premium paid till date that exceeds 25% of the annual policy premium paid till date will result in an increase in the life insurance Coverage Sun Assured subject to the then prevailing underwriting and administrative rules. The amount of additional Sum Assured will amount to 125% of the excess Top Up Premium. We would require the top up form and COI to increase in the life insurance Coverage Sum Assured.
- ULIP Policies issued on and after September 01, 2010 - Policy Owner cannot make the Top up premium without increase in the life insurance Coverage Sum Assured. If the attained age of the life insured is less than 45 then we need increase in the life insurance Coverage Sum Assured by 125% on top up premium and if the attained age of the life insured is 45 or more then we need increase in the life insurance Coverage Sum Assured by 110% on top up premium. We would require top up form and COI to increase the Sum Assured. This will be subject to underwriting and administrative rules.
- Any sum paid on an insurance policy with Aditya Birla Sun Life Insurance Company Limited (ABSLI) would be eligible for applicable tax benefits, under the Income Tax Act, 1961, as amended from time to time. For specific suitability you are requested to consult your tax advisor.
- Cheque / DD should be drawn on bank's local branch in favour of "Aditya Birla Sun Life Insurance - Policy No: XXXXXXXXX".
- The NAV for the excess top up premium remitted for which there is an increased sum assured, would be given as on the final underwriting date on which the decision to issue the top up sum assured is approved.

Policy Number:

Acknowledgement slip

Received a request for Top Up

Date:

Time: AM/PM

ABSLI Employee Name: _____ Signature: _____

Stamp/Seal of the branch

Employee Code: _____ Inward Reg Sr. Number: _____

Aditya Birla Sun Life Insurance Company Limited
(Formerly known as Birla Sun Life Insurance Company Limited)
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Life Insurance
Aditya Birla Sun Life Insurance Company Ltd.



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