



POLICY CANCELLATION (SURRENDER FORM)

Any alterations/corrections made in the form need to be signed by the policy owner. Please use a separate request form for each policy.

(Kindly fill the form in BLOCK LETTERS only.) (All fields are mandatory)

Date

d	d	m	m	y	y	y	y
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Name of the Policy holder

[illegible]

In case of address change or contact details change request, please fill up a separate Policy Service Request Form and submit with valid address proof.

SURRENDER (All fields are mandatory)

Policy number:

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Reason for surrender: ☐ Financial reasons (Immediate Fund requirements, Purchase of Asset, etc.) ☐ Unsatisfactory returns ☐ Personal reasons (Marriage, Education, Death, etc.) ☐ Unsatisfactory Services ☐ Purchase of Financial Instruments ☐ Others, please specify

Discharge Receipt:

I hereby agree to accept the surrender value and declare that I understand and agree to all the conditions and information given in this form.

Date

d	d	m	m	y	y	y	y
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Please
affix Re. 1
revenue
stamp

Witness Name: _____

Address:

Witness Signature: _____

PAN CARD number

(In case annual premium is greater than or equal to Rs.1 Lac)

Please provide bank details for Direct Transfer into Account

Bank Name:	
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Bank Address:

[illegible]

Bank Account Number:

Note: Birla Sun life Insurance will not be responsible in case of non credit to your account or if transaction is delayed or not effected at all for reasons of incomplete/ Incorrect information provided or rejected by your bank. In case of requisite information for direct credit is not received or transaction rejected by bank the payout will be made vide cheque.

11 Digit IFSC Code:

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 (You can get this code from your bank)

Mandatory Documents for processing payout

☐ Original Policy document submitted for Surrender request ☐ Self attested valid copy of Photo ID proof, carry original for verification at Branch ☐ Original Cancelled Cheque with pre printed name & account number ☐ Pass book copy/Bank statement having pre printed/or handwritten name & account number in case Cancelled cheque does not have pre printed name and account number, carry original for verification at Branch ☐ Latest Contact Details mandatory ☐ NRE bank statement reflecting any premiums paid from a NRE account

Branch Mandatory checklist

☐ All mandatory documents as listed above are collected ☐ All copies to be Self attested by Policy Owner ☐ All requirements submitted by customer to be attested by authorized BSLI personnel as per list given on the reverse

For Branch Use Only (All fields are mandatory).

Received Surrender request on

d	d	m	m	y	y	y	y
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 at : am/pm

BSLI Staff's Name, Employee ID and Signature: _____

Talisma Interaction No.:

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Branch
Stamp

Acknowledgment Slip

☐ Surrender request

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

We regret your decision and hope you have evaluated all the benefits of continuing with your policy prior to making this application.

We thank you for choosing Birla Sun Life as your preferred insurance partner and hope that you will reconsider our products in the near future.

[illegible]

Branch: _____ Received by: _____ Date Stamp and Time _____

Birla Sun Life Insurance Company Limited

Regn. No.: 109. Regd. Office: One Indiabulls Centre, Tower 1, 15th & 16th Floor, Jupiter Mill Compound, 841, Senapati Bapat Marg, Elphinstone Road, Mumbai - 400013. Contact us: 1-800-270-7000 (Toll Free) www.birlasunlife.com Insurance is the subject matter of the solicitation.

Note: Please produce this acknowledgment slip for any communication with regard to this request in future.



PRP No. FOR/2/11-12/5060

IMPORTANT GUIDELINES

- If request for Unit Linked Product is received up to 3:00 pm IST on a weekday (Mon-Fri), the same day's NAV will be applicable. However, if the request is received after 3:00 pm IST, then the next declared NAV will be applicable. If the request is received on Saturday, then the next declared NAV will be applicable
- It is mandatory to fill in the payment details section on the reverse of this form.
- If the policy is issued under Married Women's Property Act (MWP policy) then the request has to be signed by the appointed trustee.
- a) The Surrender of the units results in termination of the contract and all Rights / title and interest under the policy shall stand extinguished. b) For unit linked policies which have been issued on or after July 01, 2006, in accordance with IRDA guidelines, the surrender value can be paid only on completion of the first three policy years. c) For Unit linked policies which have been issued on or after September 01st 2010, in accordance with IRDA guidelines, policy can be surrendered only after completion of 5 years from the issue date. Hence the Surrender request can be accepted only after completion of 5 years.
- Original Cancelled cheque with Pre-printed name & account number is applicable to all payouts
- Self attested copy of Valid Photo ID is Mandatory
- List of Valid Photo ID proofs given below

- Passport	- Bankers Certificate with photograph	- ESIC card with photograph
- PAN Card	- Employer's Certificate with photograph	- Armed Force ID cards with photograph
- Voter's Identity Card	- Valid Debit / Credit card with photograph	- Post office savings A/c, PPF account with photograph
- Driving License	- Employees ID Card with photograph	- Bar Council ID for Lawyers with photograph
- PIO card with photograph		
- Letter from a recognized public Authority or public servant on individual/department letter head with stamp/seal verifying the identity of the customer.		
- Letter issued by Unique Identification (UIN) Authority of India containing details of name, address and Aadhar number is accepted as valid KYC Identification (Photo Id) and Address proofs.		
- Computerized bank statement displaying preprinted name and account number of the policy owner can be accepted if the same is attested by an authorized BSLI personnel
- For any requests received along with an additional request for Signature Change, only the below mentioned Photo Id's are valid.

- Passport	- PAN Card	- Driving License	- Bankers Certificate
- Bank Attestation			

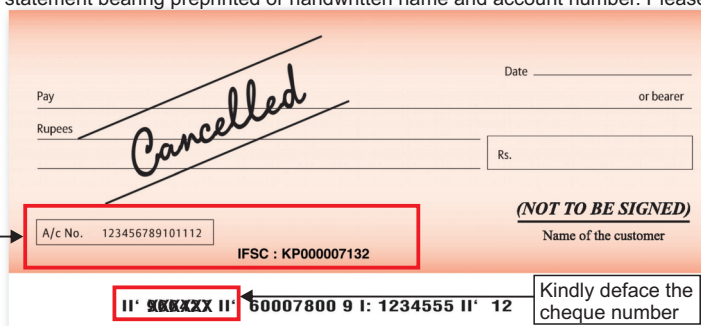
Note:

- The policy owner needs to sign as per the signature reflecting on the Photo ID.
- Along with every signature change form, a fresh discharge form is Mandatory, without which the request will not be processed.
- Valid photo ID of customer and 3rd party can be attested by BOE – other documents by authorized signatories.
- (*) In case, the cancelled cheque does not have the policy owner's name and account no. pre-printed then either copy of the Bank statement / Bank passbook with account number, account holders' name needs to be submitted. Either of these documents needs to be attested by any of the following authorised signatories:
- All MDRT, COT, TOT and CEO club members qualified for the last calendar year are also authorized signatories.
- Authorized Signatories:

DSF			
- Branch Head	- Business Partner	- Business Development Manager	- Team Manager (operations & accounts)
- Branch Manager	- Relationship Manager	- Territory Manager- sales	- Regional Manager
- Zonal Head	- Zonal Manager Operations	- Associate Partner	

Alternate Channel

- | | | | |
|------------------------|------------------------------|-----------------------------------|--------------------------------|
| - Relationship head | - Zonal Head | - Regional and Area Sales Manager | - Team leaders- Branch support |
| - Team Manager | - Zonal Sales Manager | - Senior Sales Manager | - Area Sales Manager |
| - Business Development | - Head- Operations & Manager | - Sales Manager | |
- Cheque submitted along with payout requests should be cancelled/defaced. While doing so, please ensure that the account no. / IFSC Code is clearly visible.
 - Cheque should not be signed.
 - Only the front page of the passbook/portion of the bank statement that shows the account holder's name, address, account no. and IFSC code should be submitted. Pages showing transactions should not be submitted.
 - In case the cancelled cheque carries pre-printed name and account number, but has "New account" printed on it, kindly submit an attested copy of the passbook/bank statement bearing preprinted or handwritten name and account number. Please carry original passbook/bank statement to the branch for verification purposes.



The image shows a cancelled cheque form template. It includes fields for Pay, Rupees, Date, and or bearer. A large 'Cancelled' stamp is written across the top. Below the stamp, there is a red box containing the A/c No. 123456789101112 and the IFSC : KP000007132. To the right of this box, it says '(NOT TO BE SIGNED)' and 'Name of the customer'. Below the red box, there is a black box containing the text 'II' XXXXX II' and the number 60007800 9 1: 1234555 II' 12. To the right of this box, it says 'Kindly deface the cheque number'.

Please ensure that the highlighted area is not defaced while cancelling the cheque

- For request submitted along with Indemnity bond; duplicate policy document will be dispatched to customer's residence address registered in BSLI records. As soon as the customer gets the new policy document, he can submit a fresh payout request.
- For request submitted along with address change request, first address change request shall be processed. After a cooling off period of 15 days from the address change letter dispatch date, a fresh payout request will have to be submitted.
- For request submitted along with address change request & Indemnity bond, first address change request shall be processed. Later, after a cooling off period of 15 days from the address change letter dispatch date, duplicate policy document request will be processed & dispatched to customer's residence address registered in BSLI records. As soon as the customer gets the new policy document, he can submit a fresh payout request.
- No Surrender request will be accepted without policy document. NAV applicability will be subject to receipt of the request along with the policy document and fulfillment of all requirements as applicable.

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Contact us: 1-800-270-7000 (Toll Free) www.birlasunlife.com. Insurance is the subject matter of the solicitation.