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To know more, call our toll free number 1800 270 7000

## POLICY PAYOUT REQUEST FORM

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

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

Policy Number

Name of the Policy holder  Title  First Name  Middle Name  Surname

Contact details/Call back number (Mandatory): Telephone (R) No.  STD Code  Mobile

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

Date

**REQUEST TYPE**  
( whichever applicable )

☐ **PARTIAL WITHDRAWAL**

☐ **POLICY LOAN**

☐ **MATURITY**

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:

Bank Address:

Bank Account Holder's Name:

Bank Account Number:

11 Digit IFSC Code:  (You can get this code from your bank)

**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.

### PARTIAL WITHDRAWAL (All fields are mandatory).

Reason for partial withdrawal:

Withdrawal amount: Rs.  OR ☐ Maximum amount ☐ Survival Benefit

In case the withdrawal amount requested is not available, we will be paying the maximum withdrawal amount available.

### POLICY LOAN (All fields are mandatory).

Reason for availing loan:

Loan amount: Rs.  OR ☐ Maximum amount

### MATURITY (All fields are mandatory).

Plan:

For pension plans: Maximum amount you wish to commute: Rs.  /- (Allowable limit max. 1/3rd of total maturity value)

Please fill up a separate Open Market Option form

Cheque for the balance amount to be in favour of  (Name of the company from where you want to purchase the annuities)

### Discharge Receipt

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

Date

Please  
affix Re. 1  
revenue  
stamp

Witness Name:

Address:

Witness Signature:

Signature of Policy Holder/  
Assignee in case the policy is assigned

Place:

### Mandatory Documents for processing payout

☐ Original Policy document submitted for loan request ☐ Copy of CI or YPD submitted for Withdrawal request carry original for verification at Branch ☐ Original

Cancelled Cheque with pre printed name & account number ☐ Self attested valid copy of Photo ID proof, carry original for verification at Branch ☐ 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 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 ☐ Partial Withdrawal request ☐ Policy Loan request ☐ Maturity request on  at  :  am/pm

BSLI Staff's Name, Employee ID and Signature:

Talisma Interaction No.:

Branch  
Stamp

### Acknowledgment Slip ☐ Partial Withdrawal ☐ Policy Loan ☐ Maturity

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

We thank you for choosing Birla Sun Life as your preferred insurance partner and take this opportunity to assure you of our best services at all times.

Policy No:  Name of Policy Holder

Branch:  Received by:  Date Stamp and Time

## 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 the form.
- 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
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### 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.
- Maturity:** The maturity value would be arrived at unit prices of the day on which the policy is maturing.
- Partial Withdrawal:** Partial withdrawal is subject to administrative guidelines..If the request is for an amount higher than the amount eligible, the application would be processed only for the amount eligible.
- Loan:** **a)** Loan is subject to administrative guidelines. **b)** If the request is for an amount higher than the amount eligible, the application would be processed only for the amount eligible. **c)** The original policy document would be retained by the company. The same shall be returned only upon full repayment. **d)** Payment towards loan should be specifically stated, else it will be treated as renewal premium. **e)** In case the fund value depreciates more than the outstanding loan amount, the policy will lapse
- (\*) 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 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

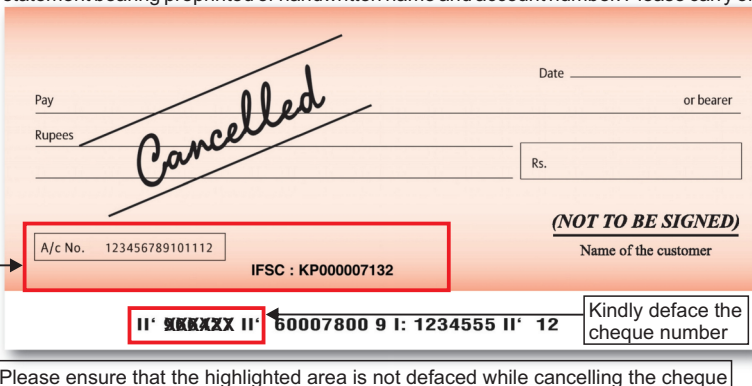
- |                  |                            |                                |  |
|------------------|----------------------------|--------------------------------|--|
| - Branch Head    | - Business Partner         | - Business Development Manager | - Team Manager (operations & accounts) |
| - 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 accountholder'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.

- 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.



The image shows a cancelled cheque form template. It includes fields for Pay, Rupees, Date, or bearer, Rs., A/c No. (123456789101112), IFSC (KP000007132), and Name of the customer. A large 'Cancelled' stamp is written diagonally across the form. A red box highlights the A/c No. and IFSC fields. Below the form, there is a barcode-like area with the text '11' XXXXX 11' and '60007800 9 I: 1234555 11' 12'. A note says 'Kindly deface the cheque number'. At the bottom, a box says 'Please ensure that the highlighted area is not defaced while cancelling the cheque'.

## Birla Sun Life Insurance Company Limited

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