

# Bank Account Updation Form for Payouts



Note: Please complete the form in CAPITAL LETTERS.

All fields with (\*) are mandatory

I request HDFC Life Insurance Company Limited to update the below bank account details for any future payout of the below mentioned policy/s.

POLICY DETAILS	Policy Number*:	<input type="text"/>	Policy Holder's Name*:	<input type="text"/>
	Additional Policy Nos. : <input type="text"/>			

BANK DETAILS	<b>Please tick (✓) any one Bank Account Type*:</b>			
	Savings Account:	<input type="checkbox"/>	Current Account:	<input type="checkbox"/>
	NRO Account:	<input type="checkbox"/>	NRE Account:	<input type="checkbox"/>
	NRO:	<input type="checkbox"/>		
	<b>Payment Method:</b> Direct Credit (NEFT / RTGS): <input type="checkbox"/>			
Account Number*:	<input type="text"/>			
Bank Branch*:	<input type="text"/>			
Bank Name*:	<input type="text"/>		IFSC Code* :	<input type="text"/>
UPI ID*:	<input type="text"/>			
I hereby authorise HDFC Life Insurance company Ltd to use my UPI id to credit policy benefits/raise premium due requests if any.				
<b>Note:</b>				
<ul style="list-style-type: none"> <li>• Please Note that the amount would be credited to the bank account number provided by you and the same will be considered as final</li> <li>• Personalised cancelled cheque or bank statement with attestation is mandatory</li> <li>• If NRE account is selected, credit to the account will be made only incase if all the premiums are paid from the same NRE account</li> <li>• If the information provided is incomplete or if there is a Mis-match of details with our records, the same will not be updated</li> <li>• HDFC Life Insurance Company Limited may use specified account details for all the linked policies with the same client, provided policy is not assigned and owner details match bank records and credit the policy related payables to this account</li> </ul>				

TAX DEDUCTIONS	1. Do you have a PAN card Yes <input type="checkbox"/> No <input type="checkbox"/>
	If Yes, kindly provide your Permanent Account Number (PAN): <input type="text"/> along with self-attested photo copy of PAN Card. TDS (Tax Deducted at Source) will be applicable as per the prevailing Income Tax Laws, which is subject to change from time to time. In case you have not provided your PAN details, payout may attract higher TDS rates. Separate tax rates will be applicable for Non-resident Indians, as specified under Income Tax Act, 1961. Please refer to the Income Tax Laws or consult a tax consultant for further information
	2. Are you currently a Resident of India Yes <input type="checkbox"/> No <input type="checkbox"/> If No, please specify country of Residence <input type="text"/>
<b>Note:</b> In case you are not a Resident of India, then tax deductions will be applicable as per beneficial provisions of treaty with the respective Country of Residence. If your Residential status is changed from NRI to Resident Indian then please submit relevant supporting documents. (Complete Pages of Passport or Other supporting document)	

DECLARATION	I take full responsibility for the genuineness and correctness of the details filled herein.	
	I hereby authorise HDFC Life Insurance company Ltd to use my UPI id to credit policy benefits/raise premium due requests if any.	
	Signature / Thumb Impression of the Policy Owner / Assignee*:	<input type="text"/>
	Date <input type="text"/>	Witness Signature*:
Name & Address of the Witness*:		<input type="text"/>
*(Should be someone other than the advisor/agent/employee of the company and who has also explained the contents of this form if signature is in vernacular or a thumb impression.)		

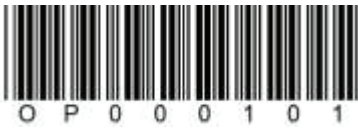
FOR OFFICE USE ONLY	Name of the Customer Service Representative:	<input type="text"/>	Branch Code:	<input type="text"/>	Signature:	<input type="text"/>
	Date:	<input type="text"/>	Employee No.:	<input type="text"/>		

ACKNOWLEDGMENT SLIP	<b>This is to acknowledge the receipt of application for Bank Account Updation for future payouts</b>				Date:	<input type="text"/>
	Documents received:	Policy No. <input type="text"/>			Sign:	<input type="text"/>
	<input type="checkbox"/> Original Policy Document <input type="checkbox"/> Valid Address Proof <input type="checkbox"/> Identity Proof <input type="checkbox"/> Bank Account Proof					
Others <input type="text"/>						

For queries or more information, call us on 1860-267-9999 (Local charges apply) | 022-68446530 (STD charges apply). Available Mon-Sat from 10 am to 7 pm. DO NOT prefix any country code e.g. +91 or 00. Email - service@hdfclife.com | nriservice@hdfclife.com (For NRI customers only) Visit - www.hdfclife.com

HDFC 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 us on 1860-267-9999 (Local charges apply) | 022-68446530 (STD charges apply). Available Mon-Sat from 10 am to 7 pm. DO NOT prefix any country code e.g. +91 or 00. | Email - service@hdfclife.com | nriservice@hdfclife.com (For NRI customers only) Visit - www.hdfclife.com

POS/BAU/OCT-2022/Ver 2.6



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DOCUMENTS REQUIRED

Please submit any one of the following listed documents along with the mandatory requirements (\*).

- 1) Self-attested valid photo ID proof \*       2) Self-attested valid address proof       3) Original Policy Documents
- 4) Original cancelled cheque with your name and account number pre-printed\* OR
- 5) Self-attested copy of bank statement / pass book copy with bank seal, if personalised cheque is not attached\*.

List of valid address proofs: Telephone Bill, Bank letter/ Account Statement, Water Bill, Electricity Bill, Valid Passport, Valid Driving License, Ration Card, ESI Card, Domicile Certificate, Company Lease Agreement/Rental Agreement, Employer's Certificate. Statement/Receipt/Bill should not be more than two months old from the request submission date. Please attach self-attested identity proof bearing photo (e.g. Pan card, Voter's ID, Passport, Driving License, Aadhar

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