

**HDFC Group Unit Linked Plan - Fund Switch**

**Scheme Details:**

Scheme Type:

Trust Name:

Policy Number:

Type of request:



All your past units will be switched to the new fund but all the future contributions will according your old fund choice.

\* Fund Choices applicable as given in the policy document

\*\*Total of percentage of Fund Switch To should be 100%

Sr. No	Account Number	Account Name	Fund Switch From	Percentage/Units/ Amount	Fund Switch To	Percentage/Units/ Amount	Validation
			Liquid Fund		Liquid Fund		Total should be = 100%
			Stable Managed Fund		Stable Managed Fund		
			Sovereign Fund*		Sovereign Fund		
			Secure Managed Fund		Secure Managed Fund		
			Defensive Managed Fund		Defensive Managed Fund		
			Balanced Managed Fund		Balanced Managed Fund		
			Equity Fund*		Equity Fund		
			Growth Fund*		Growth Fund		

Yours sincerely,

Signed for and on behalf of the Trust

1st Signatory : \_\_\_\_\_

2nd Signatory : \_\_\_\_\_

Name of Trustee/Authorised Signatory :

Note : Trustees / Authorised Signatories approved by the Board of Trustees / Employer and whose signatures have been submitted in advance to HDFC SL shall only be entitled to execute this request / form. The Policy Holder is requested to keep the signatory list updated with HDFC SL at all times to avoid last minute delays.

Date : \_\_\_\_\_

Place : \_\_\_\_\_ (Rubber Stamp and Address)

General Rules :

- (1) This investment instruction must be received before the daily cut-off time to obtain the next valuation unit prices. Please contact us for details of our current cut-off times and valuation times. (2) All other terms and conditions as specified in the Policy Documents and Schedule thereto shall apply. (3) Investment professionals regard money market instruments as unsuitable investments for the long term and are generally used for the short term. This is because money market instruments have relatively stable returns and offer high degree of capital safety. However, they tend to offer lower returns over the long term compared to other investments. (4) The plans mentioned in this proposal form have been approved by IRDA (Insurance Regulatory and Development Authority) and have been allotted an Unique Identification Number (UIN). This number is available on IRDA's website for verification.(5) The funds mentioned in this form have been allotted a Segregated Fund Identification Number (SFIN). This number is available on our website(www.hdfclife.com) for verification.