

Death Intimation of Insurance Agent

For Official Use Only

Branch Name: _____ Branch Code: _____
 Employee Name: _____ Employee Code: _____
 Received Date: _____ Sent to HO Date: _____

Photograph
of Claimant
(Nominee/Legal Heir*)

To: HDFC Life Insurance Company Limited

Agency Code: _____ Client ID: _____

Dear Sir/Madam,

This is to inform you that _____
 passed away on Date: _____ at Place: _____

Nature of Death: Accidental ☐ Non -Accidental ☐

Cause of Death: _____

With regards to the above details, I, _____,
 _____, request you to process
 the accrued/payable commission (if any) due to be paid by his/her agency.

Details of Claimant

Claimants Title – Nominee ☐ Legal Heir ☐

Claimant Name – Mr/Mrs : _____

Date of Birth: DD/MM/YYYY

Address : _____

Pin code : _____

Contact No : _____

Email ID : _____

Relationship with Agent : Spouse ☐ Children ☐ Parents ☐ Others ☐

Claimant Pan Details : _____ Or Form 97 (corresponding Form 60) : _____

Politically Exposed Person : Yes _____ No _____

Claimant NEFT Mandate / Bank Account Details :

Bank Account Number : _____

Account Holder Name : _____

Bank Name & Branch : _____

IFSC : _____ MICR : _____

Account Type : Saving _____ Current _____ NRO _____ NRE _____

I am submitting the below mentioned documents required to process the accrued/payable commission (if any) of the Agent as per the Agent licensing norms defined by HDFC Life.

Mandatory documents to be submitted (All supporting documents to be attested by nominee)	Yes/No/Not Applicable
Death Certificate issued by Municipal Corporation or by Gram Panchayat	
Identity and Address proof of the major nominee/appointee in case of minor nominee	
PAN card of the major nominee/appointee in case of minor nominee	
NEFT mandate along with original cancelled cheque leaf or bank passbook copy of the major nominee/appointee in case of minor nominee	
Age proof of the minor nominee	
Legal heir certificate (Only if the Nominee is not declared at inception/Nominee is not alive)	
KYC of deceased agent	

(All documents to be sent to the HO)

DECLARATION AND AUTHORISATION

- I here declare all the details filled/furnished above are true & correct to the best of my knowledge & belief.
- I hereby warrant the truth and correctness of the foregoing particulars in every respect and I agree that if I have made or shall make any false or untrue statement, suppress or conceal any material fact, my right to claim shall be absolutely forfeited.
- I understand and agree that the submission of this form does not mean that the request will be processed.
- I authorise HDFC Life Insurance Company Ltd. to share and obtain information on behalf of me with any reinsurer, insurance association, medical authorities, other insurers, statutory authorities, employer, court, governmental body, regulator using an investigation agency or other service hereby provide my consent for the same.

Date: _____

Place: _____

SIGN HERE

Signature of Claimant

DECLARATION TO BE MADE BY A THIRD PERSON

The Claimant has affixed his/her thumb impression/has signed in vernacular/has not filled the application. I hereby declare that the content of this application form has been explained to the Claimant in _____ language and have truthfully recorded the answers provided to me. I further declare that the Claimant has signed/affixed his/her thumb impression in my presence.

Name of the Declarant : _____

Address : _____

Date: _____

Place: _____

SIGN HERE

Signature of Third Person

Important Note: In case of any demand or favour asked by anyone including a company representative towards claim processing or settlement, the same should not be entertained and must be reported to the company immediately on the company's email id: service@hdfclife.com

INSTRUCTION FOR FILLING UP THE FORM

A. IMPORTANT INFORMATION (Please read before filling the form)

1. The form should be filled by Claimant only. In case the Claimant is minor, the guardian/appointee may fill the form.
2. Please read the declarations carefully and you should sign the claim form in the same manner as you normally sign your cheque.
3. Claim is payable subject to fulfillment of all terms and conditions.
4. No fees or commission to be paid to anyone to process this claim.
5. Make sure your address, contact numbers and email ids are current and active as the correspondence will happen through this only.
6. Asterisk (*) refers to mandatory information.

B. DOCUMENTS TO BE SUBMITTED

- (1) Death Certificate issued by local authority
- (2) Claimant's passport size photograph
- (3) Personalised Cancelled Cheque or Bank Passbook (with Printed A/c no, IFSC & Name account holder)
- (4) Claimant's Valid Identity Proof
- (5) Claimant's Valid Address Proof
- (6) Claimant's PAN CARD/Form 97 (corresponding Form 60) (if PAN Card not available)
- (7) KYC of deceased Agent
- (8) Legal heir certificate (Only if the Nominee is not declared at inception/Nominee is not alive)
- (9) Age proof of the minor nominee
- (10) Identity & Address proof of guardian in case of minor nominee

Disclaimers:

1. Copies to be submitted and originals to be presented at the time of claim submission.
2. HDFC Life Insurance Company Ltd. reserves the right to ask for more information/ documents, if required.

C. LIST OF VALID IDENTITY & ADDRESS PROOFS (Please tick the document submitted)

PHOTO IDENTITY PROOF (ANY ONE)

- | | |
|--|--|
| ☐ Aadhaar Card* | ☐ Valid Passport |
| ☐ Voter ID Card | ☐ Valid Driving License |

ADDRESS PROOF (ANY ONE)

- | |
|--|
| ☐ Voter ID Card |
| ☐ Valid Passport |
| ☐ Valid Driving License |
| ☐ Aadhaar Card* |

*I voluntarily provide my consent to use my Aadhaar to conduct identity check towards KYC compliance by HDFC Life Insurance Company Ltd.

D. NOTE: CLAIMANT NEFT MANDATE/ BANK ACCOUNT DETAILS

- A cancelled personalised cheque with the account no. and IFSC should be submitted along with the NEFT mandate. If the cheque is not personalised, a latest bank statement or copy of passbook (where account number and IFSC is mentioned) needs to be submitted with the mandate.
- In case of NEFT failure or any further requirements pending on the mandate, payout will be kept on hold till fresh NEFT mandate is received. Intimation will be sent to you for the same.

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 **022-68446530 (call 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**