

[illegible]

Name of the Policyholder/Beneficiary: \_\_\_\_\_

Contact\* No.:(Res) \_\_\_\_\_ / (Office) \_\_\_\_\_ / (Mobile) \_\_\_\_\_ (mobile no. is preferable)

Permanent Account Number (PAN): \_\_\_\_\_

Email ID: \_\_\_\_\_

*\*Contact details provided herein will be updated for all future communications. The above mentioned contact number will be considered as consent to communicate with me on the contact details provided herein.*

1. I/We understand that the complaint submitted by me on (DD/MM/YYYY) is subject to evaluation by HDFC Life Insurance Company Limited ("HDFC Life") and the decision of cancellation of this/these Policy/Policies would entirely be at the sole discretion of HDFC Life post evaluation of the given complaint. I/We understand that in case of cancellation of the policy/ policies (subject to approval by HDFC Life at its sole discretion basis the merits of the case) I/We would be entitled to receive a refund of only the premiums paid by me. I/We further declare, that after the said refund of premium, in consideration of the decision of HDFC Life under the Policy/Policies mentioned above, HDFC Life, HDFC Bank, any other Corporate Agent or any other Distributors will thereby be discharged of all its liabilities under the said Policy/Policies. I/We understand in a scenario such as this, the Policy bond held in my custody shall stand cancelled and I/We will not be entitled to claim any further amount from HDFC Life in future with regard to the Policy/Policies mentioned above.
2. I/We further undertake to refund any excess amount whether demanded by HDFC Life or not, which has been credited in excess to my account at any time due to any reason.
3. I/We understand that the initial deposit and/or renewal premiums paid is an interest free deposit and therefore does not accrue any interest.
4. The matter stands settled by HDFC Life to my satisfaction. I have no outstanding concerns and will not hold the company liable to pay any sort of interest/compensation in future.
5. I/We understand and agree that any other policy/ policies bearing number(s) held by me with HDFC Life shall remain unaffected and I/We agree to continue with the said policy/ policies under the existing terms and conditions

1. Are you a tax resident of any country other than India as per Income-tax Act, 2025 (corresponding Income-tax Act 1961)? ☐ Yes ☐ No\*

\*To be ticked if you are a tax resident in India under the Income-tax Act, 2025 (corresponding Income-tax Act 1961).

**\*\*If you are a non-resident in India as per the Income-tax Act, 2025 (corresponding Income-tax Act 1961), you are mandatorily required to submit Tax Residency Certificate (TRC) with Electronic Form 41 (corresponding Electronic Form 10F) to avail treaty benefits, otherwise tax will be deducted at source at a higher rate from policy payouts. Section 393(2) [Table:Sl.No.17] of the Income-tax Act, 2025 (corresponding Section 195 of the Income-tax Act, 1961), tax will be deducted at source from any payout to a non-resident at the rate applicable therein and subject to the conditions specified therein. Tax laws are subject to change.**

2. Self-attested documents submitted : ☐ TRC ☐ Electronic Form 41 (corresponding Electronic Form 10F)

**Customer Acknowledgment Copy (Grievance Addendum form)**

Client ID: \_\_\_\_\_ Policy No.: \_\_\_\_\_ Interaction ID: \_\_\_\_\_ Policyholder /Beneficiary name: \_\_\_\_\_

Documents Submitted : ☐ Original Cancelled Cheque ☐ Bank Passbook Copy ☐ Bank Statement ☐ NEFT Mandate ☐ Original policy Document

☐ Policy document waiver form ☐ Any other documents, please specify \_\_\_\_\_

HDFC Life Stamp

Customer Relations Officer:

Date: DD/MM/YYYY

Time:

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](mailto:service@hdfclife.com) | [nriservice@hdfclife.com](mailto:nriservice@hdfclife.com) (For NRI customers only) Visit – [www.hdfclife.com](http://www.hdfclife.com)

## Declaration

I/We hereby declare that the details and particulars given above are true and correct. If the transaction is delayed or failed for reason of incomplete or incorrect information provided by me/us as above, I/We would not hold HDFC Life Insurance Company Limited or any of its associates/employees/agents responsible. Further, I/We agree to indemnify or keep indemnifying HDFC Life against any loss, claim, damage or expenses arising out of any incomplete or incorrect information provided by me/us herein above.

Date : DD/MM/YYYY

Place: \_\_\_\_\_

SIGN HERE

Signature/Thumb Impression  
of Policyholder

SIGN HERE

Signature/Thumb Impression  
of Assignee

Signature Verified Stamp

## NEFT Mandate

☐ IF NEFT is already submitted, please do not fill in below details

☐ Please fill in the details on the NEFT Mandate portion in this form for direct transfer of payouts into your bank account through the NEFT facility.

**In case of Unit Linked Young Star or Children's plan, if the Beneficiary is major, please provide Beneficiary account details.**

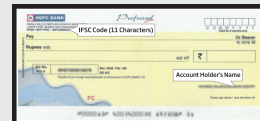
Bank Account No.:

Account Holder Name: \_\_\_\_\_

Bank Name & Branch: \_\_\_\_\_

Account Type: ☐ Savings ☐ Current ☐ NRE ☐ NRO PAN No.:

IFSC Code^:  All digit alphanumeric code appearing on your cheque leaf



### NOTE:

- A latest cancelled cheque with the account no. and IFSC should be submitted along with the above NEFT details. If the cheque is not personalised, a latest bank statement or copy of passbook (where account number and IFSC is printed) needs to be submitted with the mandate.
- This mandate, upon processing, will override any of the previously tagged NEFT Mandates for all policies, held by the client with HDFC Life.
- In case of NEFT failure or any further requirements pending on the mandate, payout will be kept on hold till a fresh NEFT mandate is received. Intimation regarding the same will be sent to you.
- Refund to NRE account (Full or Proportionate) will be subject to ratio of premium(s) paid through NRE Account. Please submit a Bank Statement or Bank Confirmation letter as an evidence for premium(s) paid through NRE account.
- In case of proportionate payout, please provide two NEFT mandates i.e. for NRE account and non-NRE account

### Declaration:

I undertake to refund any amount that is credited to my account either in excess or which is not due to me, at any time, for any reason and to this effect, I confirm that the particulars given here are true, correct and complete in all aspects. I understand and agree that the submission of this form does not mean that the request will be processed. I understand that any payout under the policy shall be strictly in accordance with the policy terms and conditions. Also, any payment shall be subject to realisation of the last renewal premium payment. Further, I understand that the Company shall not be held responsible for any non-receipt of payment on account of wrong/incorrect/incomplete information given by me in this form. If a transaction is delayed or has not come into effect at all, due to incomplete or incorrect information, I shall not hold the Company responsible in any manner whatsoever.

SIGN HERE

Signature/Thumb Impression of the  
Account Holder

Date: DD/MM/YYYY

Place: \_\_\_\_\_

## Third Party Declaration

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

Name: \_\_\_\_\_

Address: \_\_\_\_\_

Date: DD/MM/YYYY Place: \_\_\_\_\_

Signature of Third Party

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 022-68446530 (STD charges apply). DO NOT prefix any country code e.g. +91 or 00. Available Mon-Sat from 10 am to 7 pm

Email [service@hdfclife.com](mailto:service@hdfclife.com) | [nriservice@hdfclife.com](mailto:nriservice@hdfclife.com) (For NRI customers only) Visit - [www.hdfclife.com](http://www.hdfclife.com)

View Premium Calendar, Pay Premium Online,  
Track fluctuations in the fund value, Print your  
Annual Premium Statement & lots more!  
Visit [www.hdfclife.com](http://www.hdfclife.com) and register for  
My Account today!

**Call 022-68446530**

(Call Charges apply)

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