

**Annuity Option Form for
Open Market Option***For office use only:*Branch:
Received By:
Date & Time:

Branch Stamp

Policy/Application No.:

Name of the Policyholder: _____

I hereby declare that I wish to opt for the purchase price value for annuity, as per the option (any one) chosen by me below.

- ☐ 2/3rd of the vesting amount as purchase price and balance 1/3rd as cash lump sum.
- ☐ 100% of the vesting amount as purchase price.
- ☐ Amount greater than 2/3 of the vesting amount as purchase price i.e. INR _____ (specify the amount).

Name of the Annuity Service Provider: _____

I understand that any tax liability arising out of the annuity contract will be borne by me.

I understand that my policy no. _____ will stand terminated from the date of Maturity.

I am submitting following documents to HDFC Life Insurance Company Limited:

1. Immediate Annuity Option Form for OMO (duly completed).
2. Self attested photocopy of the photo identification proof.
3. Self attested photocopy of the address proof not less than 3 months.
4. Copy of Cancelled Cheque leaf with printed Name, A/c No. and IFSC code, Bank statement.
5. Duly fill NEFT Mandate.
6. Original Policy Document.

I understand that the Photo identity and address proof are necessary documents for 'Know Your Customer' that adheres to Anti-Money laundering guidelines.

Date: DD/MM/YYYY

Place: _____

SIGN HERE

Signature of the Policyholder

List of documents acceptable as Proof of Identity*

1. PAN Card
2. Voter's ID
3. Valid Driving License (Learner's License is not acceptable)
4. Valid Passport
5. Employee identity card of a listed company or public sector company
6. Employee ID cards issued by the Central or the State Government
7. Bank pass book (showing transactions within the last 6 months)
8. Defense ID card / Defense dependent's card / Ex-serviceman card, Identity cards issued by Bar Council / Indian Medical
9. Association / Institute of Chartered Accountants of India / Institute of Company Secretaries of India, Cost & Works
10. Accountants of India
11. Pension ID card issued by the State or the Central Government

List of documents acceptable as Proof of Residence*

1. Bank Statement / Passbook (showing transactions within the last 6 months)
2. Valid Passport
3. Valid Driving License (Learner's License is not acceptable)
4. Post office savings account statement
5. Latest Property or Municipal tax receipt
6. Letter of Allotment of accommodation from employer issued by State or Central Government departments, statutory or regulatory bodies, public sector undertakings, scheduled commercial banks, financial institutions and listed companies.

NOTE:

- Any document, from the list of identity proofs mentioned above, which mentions the address of the proposer, can be accepted as an address proof.
- With reference to recent regulatory changes, please submit PAN or Form 97 (corresponding Form 60) (if you do not have a PAN) with HDFC Life with immediate effect. Please update via My Account/service@hdfclife.com/022-68446530/HDFC Life branch. Ignore if submitted.

*The type of documents mentioned is only illustrative and not exhaustive.

Customer Acknowledgement Copy (Annuity Option form for OMO)Policy No.:

Policyholder Name: _____

Branch: _____

Date: DD/MM/YYYY Time: _____

Branch Stamp

For queries or more information, call us on 022-68446530 (Local 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 | nriservice@hdfclife.com (For NRI customers only) | Visit - www.hdfclife.com

Open Market Option	
Policy No.	Name of the Annuity Service Provider you wish to purchase an annuity from: (The way company wants it's name to be printed on the cheque)

Declaration

- I/We hereby declare that the particulars given above are correct. If the transaction is delayed or not effected at all for reason of incomplete or incorrect information provided by me/us 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 above.
- I/We further undertake to refund any excess amount whether demanded by HDFC Life or not, which has been credited in excess to my/our account at any time due to any reason.

Date: DD/MM/YYYY
Place: _____

SIGN HERE

Signature of Account Holder

Date: DD/MM/YYYY
Place: _____

SIGN HERE

Signature of the Policyholder
(If Policyholder is different from account holder)

Declaration

We confirm the details mentioned in the document.

Date: DD/MM/YYYY Place: _____

SIGN HERE

Signature of the Annuity Service Provider

Annuity Service Provider's Seal

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: _____

SIGN HERE

Signature of Third Person

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 (Local 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

