

Personal Details Alteration Form

1. Correction in name
2. Change in correspondence address
3. Addition/Change in Nominee

(Valid identity proof and supporting documents are mandatory)*For office use only:*

Branch Name: _____

Received on: _____

Received by: _____

Sent to HO on: _____

**Personal Details**

*Agency Code: _____

*Consultant Name: _____ (First Name) _____ (Middle Name) _____ (Last Name)

☐ **Correction in Name****NOTE:**

- For requests pertaining to change of surname and middle name after marriage, marriage certificate is mandatory.
- For all other requests involving significant name change, a gazette copy is required.
- All the supporting documents should be countersigned by the consultant.

Consultant's Corrected Name: _____

☐ **Change in Correspondence Address****NOTE:**

- Consultants have to change their address by submitting a request similar to policy servicing request submitted by the customer. Later on, he/she can request a change in address on the IRDAI portal.
- Self-attested address proof of the new address is mandatory.
- Mobile number or any one of the landline phone numbers is mandatory.

*New Address: _____

*City/ District: _____ *PIN Code: _____ *State: _____ *Mobile no.: _____

*Telephone no. (residence): _____ *Telephone no. (office): _____

*Email ID: _____

☐ **Addition/Change in Nominee details****NOTE:**

- Self-attested identity and address proof of nominee along with attestation by the Financial Consultant.
- OSV on all the documents accepted by the branch.

*Nominee Full Name : _____

*Address : _____

*Relationship with the Consultant: _____ *Percentage of entitlement : _____

Nominee's old DOB: ____/____/____ (dd/mm/yyyy)*

Nominee's New nominee DOB: ____/____/____ (dd/mm/yyyy)*

Declaration of the Consultant

I declare that the information I have given is factually correct and true. I have not withheld any material information that may influence the assessment or acceptance of this application; else the contract based on the above information will be treated as void.

*Date: ____/____/____

Place: _____

SIGN HERE

*(Signature of the Consultant)

LIST OF DOCUMENTS ADMISSIBLE AS PROOF OF RESIDENCE

Sr.No.	Documents	Identity Proofs*	Address Proofs
1	PAN Card	Y	-
2	Passport	Y	Y
3	Permanent Driving License	Y	Y
4	Voter's Identity Card issued by the Election Commission of India	Y	Y
5	Aadhaar Card	Y	Y
6	Identity card with applicant's photograph issued by the Central/ State Departments, Statutory/ Regulatory Authorities, Public Sector Undertakings, Scheduled Commercials Banks, Public Finance Institutions	Y	-
7	Letter issued by a gazetted officer not more than 6 months old, mentioning the address along with a duly attested photograph of the person	Y	Y
8	Bank account statement /Passbook not older than six months as on date of acceptance (If it contains photograph)	Y	Y
9	Documents (not more than 3 months old) issued by the Government departments of foreign jurisdiction and letter issued by the Foreign Embassy or Mission in India (If it contains photograph)	Y	Y
10	Central KYC Identifier (can be accepted, if there is no change in the current address of the client)	Y	Y

*If it contains the photograph.

NOTE

With reference to recent regulatory changes, please submit PAN or Form 97 (corresponding Form 60) with HDFC Life with immediate effect. Please update via My Account/service@hdfclife.com/022-68446530/HDFC Life branch. Ignore if submitted.

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