

NEFT Mandate

For Official use only
Branch:
Receipt Date & Time:
Received by:
Interaction ID



NEFT Mandate

☐ NEFT mandate already submitted
(Please do not fill in below details)

☐ NEFT mandate not submitted yet or if you wish to change the NEFT details (Please fill in the details below for direct transfer of payouts into your bank account through the NEFT facility).

Policy Number: _____

E- Insurance Account No.: _____

(For demat customers only)

Name of the Policyholder/Beneficiary: _____

Email ID*: _____

*Contact No.: (Mob) _____ / (off) _____ / (Res) _____

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

Payee/ Account holder Details

In case of children's plans, if beneficiary is a major, please provide beneficiary's account details

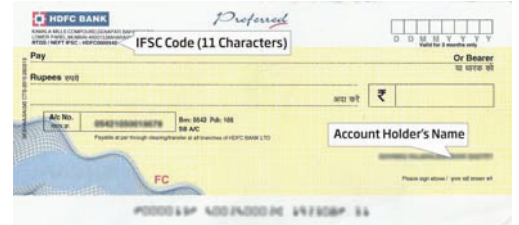
Bank Account No. _____

Account Holder Name: _____

Bank Name & Branch: _____

Account Type ☐ Savings ☐ Current ☐ NRO ☐ NRE ##All premium(s) paid from NRE Account: ☐ ##Proportionate premium(s) paid from NRE Account: ☐

IFSCA: _____ All Character code appearing on your cheque leaf



Tax declaration (except for Excess Refund, Free Look Cancellation or Withdrawal of proposal)

1. Are you a tax resident of any country other than India as per the income-tax Act, 1961? Yes** ☐ No* ☐

*To be ticked if you are a tax resident in India under the Income-tax Act 1961

**If you are a non-resident in India as per the Income Tax Act, 1961, you are mandatorily required to submit Tax Residency Certificate (TRC) with Form 10F to avail treaty benefits, otherwise tax will be deducted at source at a higher rate from policy payouts. As per 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. Does your total taxable income for the relevant financial year (April 1 to March 31) exceed INR 1 crore? Yes ☐ No ☐3. Self-attested documents submitted ☐ TRC ☐ FORM 10F

Note:

■ A cancelled personalised cheque with the account no. and IFSC code should be submitted along with the NEFT mandate. If the cheque is not personalised, a latest bank account number and IFSC code is mentioned) 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 fresh NEFT mandate is received. Intimation will be sent to you for the same

■ If this policy is purchased as QROPS through transfer of UK tax relieved assets, access to benefits from policy proceeds both in the form of commutation and Annuitisation, would be restricted till the Policyholder attains 55 years of age or the end of the lock-in period whichever is later.

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:

1. 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, I/We would not hold HDFC Life Insurance Company Limited or any of its associates/agents responsible. Further, I/We agree to keep HDFC Life indemnified against any loss caused to them due to any incorrect information provided 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.

Date: DD/MM/YYYY

Place: _____

SIGN HERE

Signature of Account Holder

SIGN HERE

Signature of Policyholder

(If policyholder is different from account holder)

SIGN HERE

Signature of Joint Life Assured

(In case of Joint Life Assured)

Declaration to be made by a third person where the Policyholder/Beneficiary/Appointee/Assignee has affixed his/her thumb impression or has signed in vernacular or has not filled the application:

The Policyholder 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 Policyholder in _____ language and have truthfully recorded the answers provided to me. I further declare that the Policyholder has signed/affixed his/her thumb impression in my presence.

Name of the Declarant: _____

Address: _____

Date: DD/MM/YYYY Place: _____

SIGN HERE

Signature of Third Person

NOTE

With reference to recent regulatory changes, please submit PAN or 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.

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). 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

Customer Acknowledgement Copy - (NEFT Mandate)

Client ID: _____ Policy No. _____ Interaction ID: _____ Policyholder/Beneficiary name: _____

Documents Submitted: ☐ Original Cancelled Cheque ☐ Bank Passbook Copy ☐ Bank Statement ☐ TRC ☐ FORM 10F

Customer Relations Officer: _____

Date: DD/MM/YYYY

Time

HDFC Life Stamp

For queries or more information, call us on 68446530-022 (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