

Customer Consent Document (CCD) - HDFC Bank

Avoid Policy Rejection. Fill out this form carefully.



Application Number

(Electronic proposal form ID number)

Application Number input field

I, HDFC Life agent (Specified Person of HDFC Bank) have ensured that this form is completed after discussing and agreeing on the proposed insurance plan

SPECIFIED PERSON'S SIGNATURE⁵

Signature box for Specified Person

Type of Insurance Plan:

(tick correct option)

Insurance Plan options: Protection, Investment, Pension, Savings, Health Cover

Main body of the form containing questions about insurance plan details, premium, and understanding of terms.

Unit Linked Policy (ULIP) section with questions about deductibles and withdrawal facilities.

Declaration section: Are you a tax resident of India... I agree and understand that the insurance plan purchased is on the basis of the need analysis...

Life to be Assured section with signature boxes for the assured person and proposer.

* In case the nominee / beneficiary is a minor, a person should be appointed to receive the money secured by the Policy in the event of death of the life to be assured during the minority of the nominee.

SI/ECS/NACH Mandate section for setting up automatic payments from a bank account.

This is to confirm that the declaration/terms has been carefully read, understood and made by me/us. I am authorizing the User entity/corporate to debit my account.

Application No.:

My MIX Code:

PAYMENT DETAILS

Initial Payment has been made from account / Debit Card / Credit Card that belongs to:

Self Proposer Third Party: Spouse Parent Children Sibling Grandparent

Mode of Payment: HDFC Bank Cheque HDFC Bank DD Net Banking
Debit Card Online/Offline Credit Card Direct Debit

CUSTOMER SIGNATURE

In case of Third Party Payor, enclosing Third Party Declaration & KYC

DECLARATION BY SPECIFIED PERSON

HDFC Bank DD/Cheque/Credit Card No./Online Ref. No.

In case of Fund Transfer, please mention existing Policy No.

Note: Only HDFC Bank instruments are allowed. There must be a debit to the HDFC bank account of Policyholder (or proposer if different from Policyholder)

- Premium amount is in line with the customer's profile and account balance: Yes
- Policyholder (proposer if different from Policyholder) is KYC / AML compliant with HDFC Bank: Yes
- Customer's income declared for the investment is in line with the bank profile of the customer: Yes
- Customer's signatures on the proposal matches with the bank records: Yes

SIGNATURE^s

Name
SP Code Employee Code:

DECLARATION BY SUPERVISOR

I hereby confirm that the proposal is complete in all respects and relevant documents have been obtained and verified as per the available records with the branch. The solicitation of the proposal is as per customer's needs.

For HDFC Bank Ltd.: Branch Manager/Supervisor

STAMP SIGNATURE

Name
Employee Code

DECLARATION BY SALES CONSULTANT & THIRD PARTY

- I hereby declare that I have explained the contents of this application form and I have also explained all the important features of the HDFC Life insurance plan to address the customer's need. I have thereby ensured that the same is completely understood by the life to be assured in _____ language and have truthfully recorded the answers provided to me.
- I further declare that the life to be assured / proposed Policyholder has signed / affixed his / her thumb impression in my presence.

Sales Consultant:

Name:
Code: Date: Place:

Third Party:

Name:
Address:
Date: Place:

SIGNATURE^s
SIGNATURE

^s FLS / Hierarchy to fill in & sign the form, if SP is the life to be assured.

Note: Please Fill Consultant Confidential Report (CCR) on POS

Renewal Payment has been made from account / Debit Card / Credit Card that belongs to:

Self Proposer Third Party: Spouse Parent Children Sibling Grandparent

DECLARATION:

1. I/ We hereby declare that the particulars given above are correct and complete. 2. I/We hereby declare that in case of a third party account holder, a KYC form of the account holder shall be submitted. 3. I/ We undertake to keep sufficient funds in the account mentioned in the mandate as on the date of execution of debit. 4. I/ We hereby authorise the Bank / Tech Process Solutions Ltd / Bill desk / any other intermediaries to communicate my / our funding account number and any other account details (as may be necessary) to HDFC Life Insurance Company Limited (HDFC Life) for the specific purpose of recovering my/ our HDFC Life premium payments through a debit instruction to my/ our account. 5. I/ We hereby authorise HDFC Life, in the instance of the ECS/SI/DD/NACH failing for any reason, to authorise the Bank/ Tech Process Solutions Ltd /Bill desk to recover the premium payable through a direct debit to my/our account with the mentioned bank. 6. If the transaction is delayed or not effected at all for reasons of incomplete or incorrect information, I will not hold HDFC Life, the Bank or the other Intermediaries responsible. 7. I/ We agree that for changing the premium amount as per my requirement, I/ We will furnish a fresh mandate for such change in the premium amount, which will supersede all other mandates previously given. 8. I/ We agree that in the event of any violation by me/ us of any undertaking confirmed in the agreement herein, shall amount to an event of default in the terms of the Insurance Policy and HDFC Life shall be entitled to invoke the remedies available to it in terms of the Policy agreement. 9. I/ We agree that in the event of the Bank being unable to debit my account for want of sufficient funds or for any other reason, HDFC Life shall be entitled to deal with my policy in the manner as described in the Policy provisions, unless the payment is received by any alternate mode on or before the specified date. 10. I/ We hereby authorise my/ our Bank to debit my/ our account with the amount of service tax and other levies as may be stipulated by the Government, from time to time, on the premium stated above and for this purpose, no further or revised authority is required by my/ our Bank. 11. I/ We hereby authorise that in the instance of a transaction failure towards an ECS request, HDFC Life can represent twice the transaction to my/ our account for realising this premium. 12. I/ We wish to avail the ECS/SI/DD/NACH facility and hereby express my unconditional consent to debit premium of my policy to above through participation in Electronic Clearing System (ECS)/ Direct Debit. I/ We understand and agree that premium amount to be debited from my account may vary due to taxes and other statutory levies as may be applicable from time to time. 13. I/ We understand and accept that the transaction will be effected on the Policy on the due date (provided the day is a working day). I/ We agree to discharge the responsibility expected of me/ us as participants under the scheme. I take full responsibility of correctness of the details filled herein. 14. I/ We authorise the above mentioned bank to debit my bank account if my/our ECS mandate is active and until I give a written request for cancellation of ECS/SI/DD/NACH. 15. In the future, if I/We opted out of ECS/Direct Debit mode there may be an increase in premium amount. 16. I/ We understand and agree that the submission of this form does not mean that the request will be processed. I/ We 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. 17. I/ We also understand and agree that the Company reserves the right to use any payout option. 18. For SI with HDFC Bank/Ratnakar Bank, premium will be debited from your account on the debit date. However, if the 1st attempt is unsuccessful, 3 more attempts will be made within grace period. 19. I/ We authorise the above mentioned bank to debit the amount from my bank account if my ECS/SI/DD/NACH is active, until I give a written request for cancellation of the Mandate.

Important Note:

1. Any cancellation, correction, alteration etc. should be countersigned by the Account Holder. 2. For SI cases (HDFC Bank/Ratnakar Bank), the NAV allotted will be the date on which the bank gives a confirmation of the debit. 3. For ECS, NAV would be allocated on the basis of the debit date. 4. Direct debit facility (non ECS location) is offered by ICICI Bank, Citibank, Union Bank of India, Bank of Baroda, State Bank of India, Axis Bank, Punjab National Bank and JSK Bank only. 5. For Direct Debit, NAV will be provided for the day when the payment is received in the HDFC Life account. 6. Request for de-activation of Auto debit facility has to be submitted at least 15 days prior to the next premium due date. 7. The premium will be debited starting from the premium due date which occurs after the date of this mandate. Till the last premium due date unless the mandate is revoked. 8. In case of any increase or decrease in premium amount due to changes in payment frequency or any Policy related changes including reduction in premium*, the existing debit instruction will be de-activated. Hence, a fresh Auto Debit Mandate is required to be submitted at any HDFC Life branch at least 30 days prior to the next premium due date. 9. In case of PBD option the NAV will be allocated as per preferred billing date and not premium due date. 10. Grace period in case of PBD will start from premium due date only and not from Preferred billing date.

* Reduction in premium is a product-specific alteration.

HDFC Standard Life Insurance Company Limited. In partnership with Standard Life Plc. CIN:U99999MH2000PLC128245. IRDAI Registration No. 101.

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