

For HDFC Life Unit Linked Plans Only

**Fund Switch & Premium Redirection**

(Please use a separate request form for each policy)

*For Official Use Only*Branch Name:  
Received by:  
Interaction ID:  
Dt & Time:Current Day NAV Next Day NAV 

Employee Code: \_\_\_\_\_

Signature: \_\_\_\_\_



Name of the Policyholder : \_\_\_\_\_ (First Name) \_\_\_\_\_ (Middle Name) \_\_\_\_\_ (Last Name)

Proposal /Policy No: \_\_\_\_\_ E-Insurance Account No.: 

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

Contact No. \*(Off) \_\_\_\_\_ / (Res) \_\_\_\_\_ / (Mob) \_\_\_\_\_ Mobile number is preferable

\* Contact details provided herein will be updated for all future communications. For customers registered under National Do Not Call Registry, this will be considered as consent to communicate with him/her on the contact details provided herein.

Fund Name (Please mention the name of the fund(s) that you wish to switch to and/or redirect premiums)	Fund Switch (current fund holdings)	Premium Redirection (future premiums)*
	New Percentage	New Percentage
<b>Total Percentage</b> (the total % of fund allocation should be 100%)	<b>100%</b>	<b>100%</b>

**General Rules:**

1. Request for the above transactions are acceptable subject to cut-off rules followed by HDFC Standard Life Insurance Co. Ltd in accordance with IRDAI. **The current cut-off timing for accepting requests to be processed with same day NAV is 3pm IST.** 2. If Asset Allocation Option (AAO) was previously opted for, the same will be treated as withdrawn on receipt of a Fund Switch / Premium Redirection request. Once withdrawn, the AAO cannot be opted for again. 3. In case a prior unit allocation is pending, your current request will be processed on the successive working day. 4. If a Fund Switch & Top Up request is received together, Fund Switch transaction will be processed first. 5. Redirection is not applicable to single premium plans. Please check your plan for the same. 6. The future premiums received will continue to get allocated as per the original fund allocation unless a Premium Redirection request is also given to change the future fund allocation. 7. The Company reserves the right to alter the charges without prior intimation. 8. Policy servicing charges may be levied as applicable. Please refer to your policy document for details. 9. To process your fund switch request, we will first cancel all of the existing units in your policy fund(s). The proceeds from the cancelled units, after deducting the applicable charge (if any), will then be used to buy units in your chosen Fund(s).

**I confirm having read all the relevant policy provisions before making this application and having understood them and its consequences. I further confirm that the premium paid above is derived out of legitimate sources of funds. I understand and agree that all the instructions are authorised by me through this form are made under my consent and are not provided under any duress or compulsion, and HDFC Life has agreed to carry out the same on my behalf. I undertake not to raise any action or claim whatsoever against HDFC Life for any reasons thereto.**

Policy Holder's / Assignee's Name: \_\_\_\_\_ Date: \_\_\_\_\_ Place: \_\_\_\_\_

Policy holder's / Assignee's Signature: \_\_\_\_\_ **\* Assignee's details are required in case of assigned policies****Declaration to be made by a third person where:**

The life assured has affixed his/her thumb impression / has signed in vernacular / has not filled the application. I hereby declare that I have explained the contents of this application form to 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 has signed/affixed his/her thumb impression in my presence.

Declarant Name \_\_\_\_\_ Signature \_\_\_\_\_ Date: \_\_\_\_\_ Place: \_\_\_\_\_

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

**Customer Acknowledgement Copy**  **Fund Switch**  **Premium Redirection** 

Policy No: \_\_\_\_\_ Interaction ID No: \_\_\_\_\_ Policyholder name: \_\_\_\_\_

Documents accepted (specify): \_\_\_\_\_

Customer Relations Officer: \_\_\_\_\_ Date: \_\_\_\_\_ Time: \_\_\_\_\_

Branch Stamp

2 SIMPLE  
STEPS

Perform Fund Switch,  
Premium Redirection  
in just 2 simple steps

My Account - Login

Register Now!

Save your time! Go Green!!

For queries or more information:



Helpline No. **18602679999** (Local charges apply). DO NOT prefix any country code e.g. +91 or 00.



service@hdfclife.com



www.hdfclife.com



Sar utha ke jyo!

Insurance is the subject matter of the solicitation.

**HDFC Standard Life Insurance Company Limited.** In partnership with Standard Life plc . IRDAI Reg. no. 101.

**Registered Office:** Lodha Excelus, 13<sup>th</sup> Floor, Apollo Mills Compound, N.M.Joshi Marg, Mahalaxmi, Mumbai-400 011.

ARN: CS/xx/xx/xxxx

PSNE62020061314

**BWARE OF SPURIOUS PHONE CALLS AND FICTITIOUS/FRAUDULENT OFFERS**

IRDAI clarifies to public that

- IRDAI or its officials do not involve in activities like sale of any kind of insurance or financial products nor invest premiums.
- IRDAI does not announce any bonus. Public receiving such phone calls are requested to lodge a police complaint along with details of phone call, number.

**HDFC Standard Life Insurance Company Limited.** In partnership with Standard Life plc.

Insurance is the subject matter of solicitation.

Regd Off: Lodha Excelus, 13<sup>th</sup> Floor, Apollo Mills Compound, N.M.Joshi Marg, Mahalaxmi, Mumbai-400 011.

Communication Address: 11th Floor, Lodha Excelus, Apollo Mills Compound, N M Joshi Marg, Mahalaxmi, Mumbai - 400011

For any queries or assistance, please contact us at any of our touch points - Helpline number- 18602679999 (Local charges apply),

SMS- 5676727 (charges apply), Email- service@hdfclife.com, Website - www.hdfclife.com

**Timing: Available Mon-Sat from 10 am to 7 pm** DO NOT prefix any country code e.g. +91 or 00.

HDFC Standard Life Insurance Company Limited. IRDAI Regn. No.101. CIN: U99999MH2000PLC128245



The product classification & Asset class is for reference purpose only. PLEASE DO NOT PRINT.

Name of the Product	UIN
HDFC Unit Linked Endowment Plan	101L015V01
HDFC Unit Linked Endowment	101L015V02
HDFC Unit Linked Young Star Plan	101L019V01
HDFC Unit Linked Young Star	101L019V02
HDFC Unit Linked Young Star Plus	101L023V01
HDFC Unit Linked Endowment Plus	101L024V01
HDFC Unit Linked Young Star Suvidha	101L025V01
HDFC Unit Linked Young Star Suvidha Plus	101L026V01
HDFC Unit Linked Endowment Suvidha	101L027V01
HDFC Unit Linked Endowment Suvidha Plus	101L028V01

NOTE: The Asset class is applicable for the products mentioned above only

Fund	SFIN	Asset Class			Equity
		Money Market Instruments	Public Deposits	Govt. Securities & Corp Bonds	
Liquid Fund	ULIF00102/01/04LiquidFund101	100%		0%	0%
Stable Managed Fund	ULIF00720/06/07StableMgFd101	*0-12 months	-	0 - 30%	0%
		*12-18 months	-	50 - 100%	0%
		*18-24 months	-	0 - 20%	0%
		*More than 24 months	-	0%	0%
Secure Managed Fund	ULIF00202/01/04SecureMgtF101	0% to 5%	0% to 20%	75% to 100%	0%
Defensive Managed Fund	ULIF00302/01/04DefensiveF101	0% to 5%	0% to 15%	50% to 85%	15% to 30%
Balanced Managed Fund	ULIF00402/01/04BalancedMF101	0% to 5%	0% to 15%	20% to 70%	30% to 60%
Equity Managed Fund	ULIF00616/01/06EquityMgFd101	0% to 5%	0% to 10%	0% to 40%	60% to 100%
Growth Fund	ULIF00502/01/04GrowthFund101	0% to 5%	0%	0%	95% to 100%

\*Indicates the residual maturity of the securities / instruments in the respective fund portfolios.

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Name of the Product	UIN
HDFC Unit Linked Enhanced Life Protection II	101L030V01
HDFC Unit Linked Endowment Plus II	101L031V01
HDFC Unit Linked YoungStar Plus II	101L032V01
HDFC SimpliLife	101L033V01
HDFC SimpliLife	101L033V02
HDFC SimpliLife	101L033V03
HDFC Unit Linked Young Star II	101L036V01
HDFC Unit Linked Endowment II	101L038V01
HDFC Unit Linked Endowment Winner	101L041V01
HDFC Unit Linked Young Star Champion	101L042V01
HDFC Young Star Super	101L048V01
HDFC Endowment Super	101L049V01
HDFC Young Star Super Suvidha	101L050V01
HDFC Endowment Super Suvidha	101L051V01
HDFC Young Star Supreme Suvidha	101L052V01
HDFC Endowment Supreme Suvidha	101L053V01
HDFC Endowment Supreme	101L058V01
HDFC Young Star Champion Suvidha	101L059V01
HDFC YoungStar Supreme	101L060V01
HDFC Endowment Champion Suvidha	101L061V01

NOTE: The Asset class is applicable for the products mentioned above only

Fund	SFIN	Asset Class		
		Money Market Instruments & Public Deposits	Govt. Securities & Corp Bonds	Equity
Liquid Fund II	ULIF02208/10/08LiquidFdII101	100%	0%	0%
Stable Managed Fund II	ULIF02308/10/08StableMFII101	0 - 100% (*Upto 24 Months)		0%
Secured Managed Fund II	ULIF02408/10/08SecureMFII101	0% to 25%	75% to 100%	0%
Defensive Managed Fund II	ULIF02508/10/08DefnsvFdII101	0% to 20%	50% to 85%	15% to 30%
Balanced Managed Fund II	ULIF02608/10/08BalncdMFII101	0% to 20%	20% to 70%	30% to 60%
Equity Managed Fund II	ULIF02708/10/08EquityMFII101	0% to 15%	0% to 40%	60% to 100%
Growth Fund II	ULIF02808/10/08GrwthFndII101	0% to 10%	0%	90% to 100%

\*Indicates the residual maturity of the securities / instruments in the respective fund portfolios.

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Name of the Product	UIN
HDFC Unit Linked Pension II	101L039V01
HDFC Unit Linked Pension Maximiser II	101L040V01
HDFC Pension Super	101L047V01
HDFC Pension Supreme	101L055V01
HDFC Unit Linked Pension Maximiser II	101L056V01
HDFC Pension Champion	101L057V01

NOTE: The Asset class is applicable for the products mentioned above only

Fund	SFIN	Asset Class		
		Money Market Instruments & Public Deposits	Govt. Securities & Corp Bonds	Equity
Liquid Fund II	ULIF02208/10/08LiquidFdII101	100%	0%	0%
Stable Managed Fund II	ULIF02308/10/08StableMFII101	0 - 100% (*Upto 24 Months)		0%
Secured Managed Fund II	ULIF02408/10/08SecureMFII101	0% to 25%	75% to 100%	0%
Defensive Managed Fund II	ULIF02508/10/08DefnsvFdII101	0% to 20%	50% to 85%	15% to 30%
Balanced Managed Fund II	ULIF02608/10/08BalncdMFII101	0% to 20%	20% to 70%	30% to 60%
Equity Managed Fund II	ULIF02708/10/08EquityMFII101	0% to 15%	0% to 40%	60% to 100%
Growth Fund II	ULIF02808/10/08GrwthFndII101	0% to 10%	0%	90% to 100%

\*Indicates the residual maturity of the securities / instruments in the respective fund portfolios.

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Name of the Product	UIN
HDFC Unit Linked Pension Plan	101L016V01
HDFC Unit Linked Pension	101L016V02
HDFC Unit Linked Pension Plus	101L029V01

NOTE: The Asset class is applicable for the products mentioned above only

Fund	SFIN	Asset Class			
		Money Market Instruments	Public Deposits	Govt. Securities & Corp Bonds	Equity
Liquid Fund	ULIF00802/01/04LiquidFund101	100%		0%	0%
Stable Managed Fund	ULIF01420/06/07StableMgFd101	*0-12 months	-	0 - 30%	0%
		*12-18 months	-	50 - 100%	0%
		*18-24 months	-	0 - 20%	0%
		*More than 24 months	-	0%	0%
Secured Managed Fund	ULIF00902/01/04SecureMgtF101	0% to 5%	0% to 20%	75% to 100%	0%
Defensive Managed Fund	ULIF01002/01/04DefensiveF101	0% to 5%	0% to 15%	50% to 85%	15% to 30%
Balanced Managed Fund	ULIF01102/01/04BalancedMF101	0% to 5%	0% to 15%	20% to 70%	30% to 60%
Equity Managed Fund	ULIF01316/01/06EquityMgFd101	0% to 5%	0% to 10%	0% to 40%	60% to 100%
Growth Fund	ULIF01202/01/04GrowthFund101	0% to 5%	0%	0%	95% to 100%

\*Indicates the residual maturity of the securities / instruments in the respective fund portfolios.

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Name of the Product	UIN
HDFC SL pension Maximus	101L074V01

NOTE: The Asset class is applicable for the products mentioned above only

Equity	Fund	SFIN	Asset Class	Equity
			Money Market Instruments ,Public Deposits,Govt. Securities & Corp Bonds	
Pension Guarantee Fund 1	101L074V01	ULIF04224/01/11PenGuaFnd1101	70% -100%	0% - 30%

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Name of the Product	UIN
HDFC Life Pension Super Plus	101L085V02
HDFC Life Single Premium Pension Super	101L086V02
HDFC Life Pension Super Plus	101L085V01
HDFC Life Single Premium Pension Super	101L086V01

NOTE: The Asset class is applicable for the products mentioned above only

Fund	SFIN	Asset Class		
		Money Market Instruments	Govt. Securities & Corp Bonds	Equity
Pension Super Plus Fund - 2012	ULIF04818/06/12PenSuPls12101	0% - 40%	40% - 100%	0% - 60%



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Name of the Product	UIN
HDFC Wealth Maximiser Plus	101L034V01
HDFC Unit Linked Wealth Multiplier	101L044V01

NOTE: The Asset class is applicable for the products mentioned above only

Fund	SFIN	Asset Class	Asset Allocation
Money Plus Fund	ULIF02904/08/08MoneyPlusF101	*All debt instruments maturity less than equal to 12 months	0 - 30%
		*Bank deposits with maturity greater than equal to 12 months and lesser than or equal to 36 months	0 - 20%
		*Government Securities with maturity greater than equal to 12 months and lesser than or equal to 36 months	40 - 100%
		*Corporate Debt with maturity greater than equal to 12 months and lesser than or equal to 36 months	0 - 10%
Bond Opportunities Fund	ULIF03004/08/08BondOprtFd101	Money Market Instruments	0 - 5%
		Public Deposits	0 - 15%
		Govt. Securities	50 - 60%
		Corporate Bonds	20 - 30%
		Equity	0%
Large Cap Fund	ULIF03204/08/08Large-CapF101	Money Market Instruments	0-5%
		Equity	95-100%
Mid Cap Fund	ULIF03104/08/08Mid-capFnd101	Money Market Instruments	0-5%
		Equity	95-100%
Manager's Fund	ULIF03304/08/08ManagerFnd101	All Debt with maturity < 12 Months	0% - 40%
		Money Market Instruments & Public Deposits	0% - 25%
		Govt Securities & Corporate Bonds	5% - 65%
		Large Cap Equity	10% - 45%
		Mid Cap Equity	10% - 45%

\*Indicates the residual maturity of the securities / instruments in the respective fund portfolios.

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Name of the Product	UIN
HDFC Life Click 2 Invest	101L100V01

NOTE: The Asset class is applicable for the products mentioned above only

Fund	SFIN	Asset Class		
		Money Market Instruments & Public Deposits	Govt. Securities & Corp Bonds	Equity
Balanced Fund	ULIF03901/09/10BalancedFd101	0% to 20%	0% to 60%	40% to 80%
Income Fund	ULIF03401/01/10IncomeFund101	0% to 20%	80% to 100%	-
BlueChip Fund	ULIF03501/01/10BlueChipFd101	0% to 20%	-	80% to 100%
Opportunities Fund	ULIF03601/01/10OpprtntyFd101	0% to 20%	-	80% to 100%
Equity Plus Fund	ULIF05301/08/13EquityPlus101	0% to 20%	0% to 20%	80% to 100%
Diversified Equity Fund	ULIF05501/08/13DivrEqtyFd101	0% to 40%	0% to 40%	60% to 100%
Bond Fund	ULIF05601/08/13Bond Funds101	0% to 60%	40% to 100%	-
Conservative Fund	ULIF05801/08/13ConsertvFd101	0% to 60%	40% to 100%	-

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Name of the Product	Income Fund	Blue Chip Fund	Opportunities Fund	Vantage Fund	Short Term Fund	Balanced Fund
HDFC Wealth Builder	101L054V01	101L054V01	101L054V01	101L054V01	NA	NA
HDFC SL Crest	101L064V01	101L064V01	101L064V01	NA	101L064V01	101L064V01
HDFC SL Crest	101L064V02	101L064V02	101L064V02	NA	NA	101L064V02
HDFC SL Youngstar Super II	101L065V01	101L065V01	101L065V01	NA	101L065V01	101L065V01
HDFC SL ProGrowth Super II	101L066V01	101L066V01	101L066V01	NA	101L066V01	101L066V01
HDFC SL ProGrowth Super II	101L066V02	101L066V02	101L066V02	NA	NA	101L066V02
HDFC SL ProGrowth Maximiser	101L067V01	101L067V01	101L067V01	NA	101L067V01	101L067V01
HDFC SL ProGrowth Maximizer	101L067V02	101L067V02	101L067V02	NA	NA	101L067V02
HDFC SL Young Star Super Premium	101L068V01	101L068V01	101L068V01	NA	101L068V01	101L068V01
HDFC SL Young Star Super Premium	101L068V02	101L068V02	101L068V02	NA	NA	101L068V02
HDFC SL ProGrowth Flexi	101L072V01	101L072V01	101L072V01	NA	101L072V01	101L072V01
HDFC SL ProGrowth Flexi	101L072V02	101L072V02	101L072V02	NA	NA	101L072V02
HDFC SL ProGrowth Plus	101L081V01	101L081V01	101L081V01	NA	101L081V01	101L081V01
HDFC SL ProGrowth Plus	101L081V02	101L081V02	101L081V02	NA	NA	101L081V02
HDFC Life Smart Women Plan	101L082V01	101L082V01	101L082V01	NA	101L082V01	101L082V01
HDFC Life Smart Woman	101L082V02	101L082V02	101L082V02	NA	NA	101L082V02
HDFC Life Invest Wise	101L083V01	101L083V01	101L083V01	NA	101L083V01	101L083V01
HDFC Life Invest wise	101L083V02	101L083V02	101L083V02	NA	NA	101L083V02

NOTE: The Asset class is applicable for the products mentioned above only

Fund	SFIN	Asset Class		
		Money Market Instruments & Public Deposits	Govt. Securities & Corp Bonds	Equity
Income Fund	ULIF03401/01/10IncomeFund101	0% to 20%	80% to 100%	-
Blue Chip Fund	ULIF03501/01/10BlueChipFd101	0% to 20%	-	80% to 100%
Opportunities Fund	ULIF03601/01/10OpprtntyFd101	0% to 20%	-	80% to 100%
Vantage Fund	ULIF03701/01/10VantageFnd101	0% - 40%	10% to 70%	10% to 70%
Short Term Fund	ULIF03801/09/10ShortTrmFd101	0% to 100% (*upto 36 Months)		-
Balanced Fund	ULIF03901/09/10BalancedFd101	0% to 20%	0% to 60%	40% to 80%

\*Indicates the residual maturity of the securities / instruments in the respective fund portfolios.