

**NEFT Mandate**

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



Policy Number: \_\_\_\_\_ E- Insurance Account No.: \_\_\_\_\_ (For demat customers only)

Name of the Policyholder/Beneficiary: \_\_\_\_\_

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

\*Contact No.: (Mob) \_\_\_\_\_ / (Off) \_\_\_\_\_ / (Res) \_\_\_\_\_

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

**Payee/ Account holder Details**

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

Bank Account No. : \_\_\_\_\_

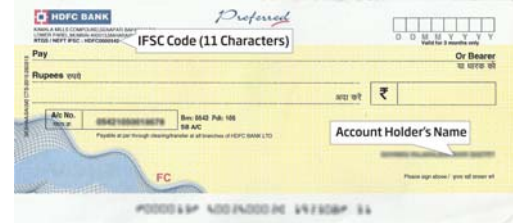
Account Holder Name: \_\_\_\_\_

Bank Name & Branch: \_\_\_\_\_

Account Type  Savings  Current  NRO  NRE#

\*All premium(s) paid from NRE Account:  \*\* Proportionate premium(s) paid from NRE Account:

IFSC Code ^: \_\_\_\_\_ ^11 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 10 F

**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 statement (not more than 3 months old) or copy of passbook (where 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.

\*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:**

- 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 Standard Life Insurance Company Limited ("HDFC Life") or any of its associates/agents responsible. Further, I agree to keep HDFC Life indemnified against any loss caused to them due to any incorrect information provided 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 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 Policyholder

(If policyholder is different from account holder)

**Declaration to be made by a third person where the Payee /Beneficiary/Appointee 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

**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 10 F

Customer Relations Officer: \_\_\_\_\_

Date: DD/MM/YYYY Time: \_\_\_\_\_

HDFC Life Stamp