

POLICY SERVICING FREELook CANCELLATION (Traditional and Unit Linked product) REQUEST FORM

TATA AIA LIFE
making Good happen™

IN LINKED POLICY, THE INVESTMENT RISK IN INVESTMENT PORTFOLIO IS BORNE BY THE POLICYHOLDER

Policy Number: PAN*: (Please enclose copy of PAN card)
Name of Policyholder:
Landline / Mobile No. Email Id:
EIA No: Correspondence Address:

RESIDENCE FOR TAX PURPOSES IN JURISDICTION(S) OUTSIDE INDIA: ☐ Yes ☐ No
(If 'YES' then mandatorily fill the NRI/PIO/OCI/Foreign Nationals Questionnaire/FATCA & CRS – Self certification form)

1. FREELook CANCELLATION (Unit Linked and Traditional Products)

I, the Owner of the policy would like to cancel the policy which I have received on within freelook period due to
☐ Not satisfied with policy terms & conditions ☐ Financial problem ☐ Personal reason ☐ No requirement

I understand and agree that the cancellation would be subject to the freelook cancellation policy provisions of the mentioned policy contract.
Documents Submitted (Please tick appropriately):

☐ Original Policy Document ☐ Reason for non submission of Policy Document

2. PAYMENT DETAILS (MANDATORY) National Electronic Fund Transfer (NEFT)

Name of Bank Account Holder
Full Name of the Bank Branch Name
Bank Account No
☐ RESIDENT ☐ NON RESIDENT
Account Type: ☐ Current ☐ Savings ☐ NRO ☐ NRE* (For *NRE account refund cheque with NRE letter will be processed.
Additional documents may be called as required by the taxation laws in force)
IFSC Code: MICR Code: (Please refer your cheque book)

Original personalized cancelled cheque is mandatory along with NEFT details. If personalized cheque is not available the form has to be attested by bank and submitted along with copy of Bank Passbook/Bank statement. Bank attestation is necessary in case original cancelled cheque is not attached.

CERTIFICATION / ATTESTATION BY ACCOUNT HOLDER'S BANK: (Bank Use Only)

We hereby certify that the particulars furnished above are correct as per our records and this account is currently operational. We hereby confirm that the below signature(s) are as per our records.

Bank Authorized Signatory with Date

Bank Branch

Bank Stamp

DECLARATION AND AUTHORISATION

I/We authorize Tata AIA Life Insurance Company to Credit the above mentioned bank account for crediting the payouts. I/we understand that the information provided by me/us may be shared with third parties for compliance with any legal or regulatory requirements. I/We hereby declare that the particulars given above are correct and complete. If the transaction is delayed or not effected at all for the reasons of incomplete or incorrect information provided above then the user institution i.e Tata AIA Life Insurance Company would not be held responsible. I/We shall intimate Tata AIA Life about any change in the above details as and when the change occurs. I understand that on Freelook Cancellation of the policy, the policy stands cancelled and terminated and that such a payment will be full and final settlement of the claim under the policy and the Company will stand discharged of all its further liabilities. I/We understand and agree that, the said request shall be treated as valid on acceptance by the company with proper branch, date and time stamp. freelook cancellation request to be submitted in person by the Policyholder along with the requirements mentioned under Section 1 & 2. freelook cancellation requests received through any other mode are liable to be rejected. All applicable taxes, duties, surcharge, cesses or levies, as may be imposed by Government, any statutory or administrative authority from time to time, on the premiums payable and benefits secured under Policy, shall be borne and paid by the Policyholder.

Signature of Policyholder/Assignee/Trustee (if other than insured)

Signature of Witness

