

## Other Policy Servicing Requests

Apart from the above mentioned major categories of servicing requests, the Policy Holder may approach SBI for other minor requests or changes. Various other requests and the process of handling the same is mentioned in the below mentioned table.

**Table 1.1– Summary of Various Policy Servicing Requests**

Name of the Servicing Request	How to service the request
<b>Deletion of Riders</b>	The Policy Holder's request for deletion of Riders should be sent to SBI Life office for effecting the changes.
<b>Re-issue of stale cheque , Original Cheque is mutilated or damaged , Change in Name etc</b>	<p>The Policy Holder needs to submit a complete Re-issuance Request Form. The stale or mutilated cheque should be attached with the re-issuance request.</p> <p>Original cancelled cheque with pre-printed account name or self attested copy of the Passbook with last one month's transaction should be submitted along with the re-issuance request.</p> <p>A Self attested photocopy of the KYC documents along with the Original should be submitted for verification.</p> <p>In case of Name Correction, Address Change or Correction in Account Number, necessary documentary evidence should be submitted along with the request Form.</p>
<b>Change of Appointee</b>	<p>A Minor can be appointed as a Nominee. In such cases, an Appointee should be appointed to receive the Policy moneys in the eventuality of death of the Life Assured during the Minority of the Nominee. The Appointee should be invariably a Major person and competent to contract and preferably a close relative of the Minor Nominee.</p> <p>The change of Appointee Form should be filled and sent to SBI Life branch for effecting Change of Appointee.</p>
<b>Funds Switch</b>	<p>For Unit linked Policies, a policy holder has an option to switch from one fund to another. The customer has to submit the funds switch request at an SBI Life branch before 3 PM to get his funds switched on same day.</p> <p>If the request is received after 3 pm, then the same is processed on the next working day. The allocation of units will be done as per applicable NAV for the day of processing.</p> <p>The Funds Switch Request Form should be completed and signed by the Policy Holder.</p> <p>The total funds percentage from and to should be 100 %.</p> <p>The Form should be witnessed with date and place. In case of an Assigned Policy, the Fund Request Form should be signed by the Assignee.</p>
<b>Funds Re-direction</b>	For Unit Linked Policies, the Policy Holder may alter the allocation percentage for future premiums and future top-up premiums by giving a

	<p>written notice to the Insurance Company before a specific period ahead of renewal premium due date. Redirection is applicable to all future premiums but does not affect the existing units.</p> <p>The Policy should be in force for effecting re-direction.</p> <p>The Policy re-direction Form should be complete and the fund name and percentages should be correctly mentioned. The total percentage should equal to 100 %.</p>
<b>Request for Change in Signature</b>	<p><b>The Policy Holder has to personally visit the SBI Life branch and submit the Change in Signature request Form.</b></p> <p>A recent photograph of the Policy Holder needs to be affixed on the Form.</p> <p>A specimen Signature Form has to be attested by the banker and SBI Life official.</p> <p>KYC documents (both ID &amp; Address Proof) in original are to be submitted for verification by SBIL staff along with self attested photocopies of the same.</p> <p>The Policy Holder has to sign the Change of Signature Form in front of an SBI Life employee.</p>
<b>Request for Change in Contact details</b>	<p>The completed request should be forwarded to the nearest SBI Life Branch for effecting the changes.</p>

All the required forms are available at [http://www.sbilife.co.in/sbilife/content/17\\_3104](http://www.sbilife.co.in/sbilife/content/17_3104)