Max Life Insurance Company Limited

Regd. Office : 419, Bhai Mohan Singh Nagar, Railmajra, Tehsil Balachaur, District Nawanshahr, Punjab, 144533

Proposer/ Joint Life

Payor

Head Office: 11th & 12th Floor, DLF Square, Jacaranda Marg, DLF City Phase-II, Gurugram - Haryana, 122002			F City				
Non Linked P			•		Attach Recent Photograph	Attach Recent Photograph	
Proposal Numb	•		GO/CA/Broker Code: 48131	0			
			y or have currently applied simultaneous policie	s? \square_{Yes}	I No. If yes give Policy/Pi	roposal number	
Purpose of Insura	nce \square_{Sa}	vings	Child Future	ension	Protection	Tax Benefit	
Objective of Insur				artnership [✓ Individual		
Product Solution		· —			Affinity Customer	Existing Customer	
			A. PERSONAL	DETAII	-	Existing Oustonier	
			PROPOSER/JOINT LIFE	DETAIL			
1. Title MR			PROPOSER/JOINT LIFE		☐ LIFE TO BE INSUR	ED (if other than proposer)	
	First						
	riisi	Shubha	dIII				
2. Name	Middle						
	Last	Jain					
First Sushil 3. Father's /							
Husband Name Last Kuma			Jain				
4. Date of Birth 24/05/1994							
5. Gender			ale Female Transgender		Male Female Transgender		
6. Nationality Indian			dian NRI PIO Foreign National		□ Indian □ NRI □ PIO □	Foreign National	
Residence for Tax purposes in Jurisdiction(s) outside India: No							
(If Yes then FATCA	\ & CRS-Self	Certifica	ation Form to be mandatorily completed)				
7. Marital Status		Single					
8. Education Gradu		Gradua	ate				
9. Relationship wi Proposer/Joint Lif		Self					
10. Industry Type		Others TEXTII	LE INDUSTRY				
11. Organisation 1	Гуре	NA					
12. Occupation / Job Title Salarie		Salarie	d / PROCESS ENGINEER				
13. Name of entity / SAGA		SAGAF	GAR MANUFACTURER PRIVATE LIMITED				
14. Annual Income (Rs) 420000)				
15. Is the Life to b	e Insured / F	Propose	r / Joint Life / Nominee / Payor a Politically E	xposed Pe	erson ? Yes No		
16. NOMINEE DETAILS			Nominee 1 (Mandatory)	N	Iominee 2 (Optional)	Nominee 3 (Optional)	
a. Title			MS	MR			
	First		RACHNA	Sushil			
b. Name	Middle	•		Kumar			
	Last		JAIN	Jain			
c. Date of Birth			16/09/1966	20/03/1962	2		

d. Gender	Female			Male							
e. Percentage		50 %			50 %			%			
f. Relationship with Proposer/Joint Life		Spouse	Spouse Parents Other			Spouse	✓ F	Parents Oth	-	Spouse	Parents
g. Appointee Full Name (if nominee is under age 18)											
h. Appointee relationship to Nominee											
i. Appointee Gender		□ _{Male} □] _{Female} []-	Transgende	er	Male C	Fen	nale Transo	jender		
j. Appointee Date of Birth											
17. CURRENT RESIDENTIAL A	DDRESS	3				•					
House No./Apt. Name	pt. Name C-33/3 Sheetal Kunj Near Aashi Medical										
Society Road/Area/Sector	Shahe	nsha Garden	Bhopal								
Landmark	Punjab	oi Bagh Gurud	dhwara								
Village/Town							City /	District Bhop	al		
Pin Code	46202	3		St	ate	e / U.T. MADHY	A PR	ADESH	Country	India	
Mobile # 1	99778	87336	N	lobile # 2	98	393213836	STD (Code		Telephone	e #
E-mail ID	Shubh	amJain0013(@gmail.com								
18. PERMANENT RESIDENTIAL	L ADDRE	ESS (optional)								
House No./Apt. Name C-33/3 Sheetal Kunj Near Aashi Medical											
Society Road/Area/Sector	Shahensha Garden Bhopal										
Landmark	Punjak	oi Bagh Gurud	dhwara								
Village/Town						City/ District Bhopal					
Pin Code	46202	3		St	ate	/ U.T. MADHY	A PR	ADESH	Country	India	
19. Preferred Mailing Address	19. Preferred Mailing Address Current Residential Permanent Residential										
20. Do you wish to hold this Po	olicy elec	tronically ur	nder e-insurar	nce ?	Ye	s \square_{No}					
a. e-Insurance Account No. (if av	/ailable):		and I	nsurance R	?ep	ository name:					
b. Preferred Insurance Repositor	ry you wo	uld like to ha	ve your e-Insu	rance Acco	unt	t CAMSRep	, 🗆	Karvy CIRI	_ ✓ _{NSI}	DL	
		B. COVE	ERAGE IN	IFORM.	A	ΓΙΟΝ - Type	of	Coverage			
a. Base Plan	Variant	Premium Back Option	Sum Assured/ Income Payout	Income Payout Frequency	,	Coverage Term	P	Premium ayment Term	Modal	Premium	GST
Max Life Smart Secure Plus Plan	Life Cover	No	Rs 5000000.00	NA		47		32	Rs	646.05	Rs 116.29
b. Riders/ Optional Benefits	tiders/ Optional Benefits			C	overage Term		Premium ment Term	Modal F	Premium	GST	
Waiver Of Premium No Rs 646.05			Same as Rider Coverage Term Rs 17.53		Rs 3.16						
Modal Premium without GST* and Cess Rs 663.58 GST* and applicable Ces			ess	Rs 119.45		Total Prem	nium Paid	Rs 783.0	03		
*GST shall comprise of CGST, SGST/UTGST or IGST (whichever is applicable) including cesses and levies, if any. All applicable taxes, cesses and levies, as per prevailing laws, shall be borne by you.											
c. Death Benefit Option Life Cover d. Life Stage Benefit \square_{Yes} $\overline{\vee}_{No}$ \square_{NA}											
Bonus Options (Not Applicable for plans that offer reversionary bonus)					id t	d to Policy holder Premium Offset Paid-up Addition				d-up Addition	
2. NEFT BANK A/C DETAILS (applicable at select cities as p							ccour	nt through Electr	onic mode	e of paymer	nt. (This will be
Bank Account Number:-					$\overline{}$	Account Holder's	Name	1:-			
MICR Code:-					†	IFSC Code:-					



Bank Name	Pranch:									\neg
Dank Name & Diancii.										
Type of Bank Account: Saving Current Others										
										$\overline{}$
3. PERMAN	IENT ACCOUNT NUMBER (PAN)		AVNPJ4699N Lurm 60	(for proposer/ life)	/ joint Form 60)		(i	or insured	1)
	TDS may be applicable, in accordance with Income Tax Act 1961, as amended from time to time.									
4. MODE OF	4. MODE OF PAYMENT Monthly									
5. RENEWAL	PREMIUM BY	Cards								
6. SOURCE	OF FUNDS	Salary								
7. IS PAYOR	DIFFERENT FROM THE PROPOS	ER? Yes	No							
8. Are you a	Max Life Agent Advisor or an emp	oloyee of a Max gr	roup company/ Co	porate Agents?	Yes ✓ No					
9. DESIRED	EFFECTIVE DATE OF POLICY 0	5/10/2022								
10. PREMIU	JM PAYMENT DETAILS									
Amount in	Words: Seven Hundred Eighty	Three								
Paid Rs:	783.03			Payment by Card	ds					
Cheque / Di	raft No. / Instrument No			Date: 05/10/202	22 11:22:49 AM					
Bank Name	and Branch:									
							Propo	oser/	Life to	be
	C INFORMA	TION OF L	IEE TO BE I	MCHBED			Joint		Insur	
C. INFORMATION OF LIFE TO BE INSURED							Vaa	No	Vac	No
							Yes	NO	Yes	INO
	ve any life or Critical Illness insuranc ion for Life/ Health/ Critical Illness ins					3		V		
Issued or Pending LIFE: TOTAL Sum Assured:- CI / DD: TOTAL Sur						AL Sum	1 Assure	ed:-		
Offered at modified terms, rejected or postponed										
	2. In the next 12 months you intend to travel or reside abroad other than on holiday of more than 4 weeks?									
3. Do you par	rticipate or do you intend to participa	te in any hazardou	s activities as part o	f your Occupation/	Sports/ Hobby?			V		<u> </u>
Details:	ever been convicted or are you unde	r investigation for a	any criminal charges	2			<u> </u>			
4. Have you ever been convicted or are you under investigation for any criminal charges? Details:								✓		
5. FOR FEMA	ALE LIFE TO BE INSURED									
Spouse Detail:	Occupation:	Income:		Insurance Amo	ount:	Are :	you pre	gnant?	Yes	√
If "Yes", how	v many months?	Do you have any	complications relate	ed to pregnancy?	If "Yes", g	give de	tails:			
6 FOR MINO	DR LIFE TO BE INSURED (Age <18		complications relate	ed to pregnancy:						
Parent's Annu		, y13.)	Pare	nt's - Total insuranc	ce cover:-					
- diones / min			1. 4.0	o rotarmouram					_	
						Pro	poser	/Joint	Life	
	D. MEDICAL INFORMATION be Life Insured									
						Y	es	No		
							Ĩ		Yes	No
	1. FAMILY HISTORY: Has any two (2) or more of your family members (Parents & Siblings) ever been diagnosed with Diabetes or Hypertension or Kidney Failure or Cancer or Heart Attack or any Hereditary Disorder before the age of 60?									
2.		Proposer				Life To Be Insured				
Height		cms	5 feet	11 inch	cms feet in		inch			
Weight		80 Kgs.			kgs.					
3. HAVE Y	OU EVER BEEN INVESTIGATED,	TREATED OR DIA	AGNOSED WITH AN	Y OF THE FOLLO	WING CONDITION	IS. If	Prop	oser/	Life t	to

YES, PLEASE PROVIDE DETAILS : No	Joint Life Yes No	be Insured
		Yes No
i). Diabetes /High blood sugar levels		
ii). Hypertension/ High Blood Pressure, High Cholesterol or Thyroid disorder		
iii). Heart or vascular disorder including chest pain, stroke, heart attack or Angioplasty, CABG or any other heart surgery.		
iv). Breathing or lung disorders including asthma, emphysema, tuberculosis.		
v). Liver or digestive system related disorder including jaundice ,gall bladder, pancreas or Hepatitis B/C.		
vi). Any abnormal growth like tumour,lump,cancer or blood disorder, including anemia or thalassaemia or Sexually transmitted disease (STD) including HIV or AIDS.		
vii). Any kind of Kidney or bladder disorder, including kidney failure, renal stone, nephritis or prostrate disorder.		
viii). Any neurological or mental health problem like paralysis, multiple sclerosis, Parkinson's, epilepsy, depression or anxiety.		
ix). Muscular-skeletal or joint disorders, including any kind of arthritis, gout, osteoporosis.		
x). Are you having history of any hospitalization, treatment or investigation?		
xi). Have you advised now or in last 5 yrs tests like X-Ray/CT scan/MRI/ Ultrasonography/ ECG/Blood test or any other investigatory or diagnostic tests, or any type of surgery.		
Xii). Have you ever been diagnosed with any form of internal or external congenital anomaly or defect i.e. any condition(s) which is present since birth, and which is abnormal with reference to form, structure or position?		
Xiii). Have you had any genetic testing before?		
4. TOBACCO / ALCOHOL / DRUGS CONSUMPTION: Do you consume any of the following ?		
i). Tobacco (Smoking /Chewing) currently or even occasionally in last 1 year ?		
Are you smoking more than 20 cigarettes/ day or chew more than 10 sachet/day of tobacco?		
ii) Are you drinking any kind of liquor more than 3 days a week ?		
Have you ever been advised to quit alcohol?		
iii). Are you taking drugs like Cannabis/Marijuana/Ecstacy/Heroin/LSD/Amphetamines or any other illegal drugs?		

E. DECLARATION AND AUTHORISATION

DECLARATION BY PROPOSER/ JOINT LIFE

I/We hereby declare that I/We fully understand the meaning and scope of the Proposal form and the questions contained above and I am submitting the completed proposal form of my/our own volition, and confirm that I/We have not been induced by anyone to make the Proposal. I/We have been explained the nature of questions and the importance of disclosing all material information.

I/We further declare that all the statements and declarations herein shall be the basis of a contract between me/us and the Companyand that I/We have made complete, true and accurate disclosure of all the facts and circumstances and have not withheld any information that may be relevant to enable the Company to make an informed decision about the acceptability of the Proposal. I agree that in case of any fraud or misstatement, action will be initiated as per Section 45 of Insurance Act, 1938, as amended from time to time. I/We undertake to notify the Company, forthwith in writing, of any change in any of the statements made in the Proposal subsequent to the signing of this proposal and before acceptance of risk and issuance of the Policy by the Company. The first and subsequent year premium will paid out of legally acquired source of income. I will provide information as and when required by the Company, acting on its own or under any order or instruction received from Statutory Authorities, as regards to the sources of funds or utilizations or withdrawals. I agree that the Company may provide any information related to me as available to the Company at any time, to any Statutory Authority in relation to the any laws including the laws governing prevention of money laundering, applicable in the country. To enable the Company to assess the risk under my/our proposal or for any other purpose in relation to the policy,

I/we, my/our heirs, administrators or executors or assignees hereby authorize my past or present employer(s)/business association/medical practitioners /other agencies or governmental and/or any regulatory bodies, insurance repositories, CERSAI/ UIDAI, reinsurers / hospitals or diagnostic centres/ other insurance companies/ service providers to disclose and make available to the Company such details/records, as may be requested by the Company. I understand that I have disclosed my personal information with Max life and I hereby provide consent to Max Life to share, store my information with its authorized service providers for servicing this policy/proposal such as issuance, underwriting renewal and claims process with respect to this policy as per the regulation applicable from time to time. I/We submit the mandate to credit My / Our account towards all payments against the above policy and agree and understand that payouts would be processed through electronic mode of payment and will be affected at select cities as per facilities/ arrangements of Max Life Insurance. I/We authorize Max Life to send all communications by E-mail, SMS or any other communication mode. I/We agree to receive regular reminders, updates / alerts from Max life from time to time.

I do hereby certify that above stated information regarding the nationality and tax residential status is correct in all respects and may be used for all purposes, including reporting to statutory authorities & compliances, and understand that it is my responsibility to report the changes, if any, to Max Life within 2 weeks of occurrence of such change.

Signature / Thumb Impression / Electronic Signature of Proposer/ Joint Life							
Place:- BHOPAL Date:- 05/10/2022							
VERNACULAR /ILLITERATE DEC	CLARATION						
have fully explained thecontents of this proposal impression/signature of the proposer/Life to be In answers given by the Proposer/Life to be Insured I have understood the content of the proposal for	to the proposer/Life to be Insured sured has been appended/affixed m as explained to me in	d ind after fully unde	whose identify can be easily established.) I hereby declare that I language, as understood by him/her and that the left thumberstanding the contents thereof. I have truthfully recorded the ge by the declarant, Mr./Ms. g my signature/thumb-impression.				
Name of the Declarant:		Address of th	he Declarant:				
I have understood the content of the proposal fo			age by the declarant, Mr./Ms. ng my signature/thumb-impression.				
Signature / Thumb Impression / Electro	nic Signature of Declarant	Signature /	Thumb Impression / Electronic Signature of Proposer/ Joint Life				
DECLARATION BY PRINCIPAL C	OFFICER/AGENT ADVI	SOR/SPEC	IFIED PERSON				
questions contained in this Proposal form and of the questions forms the basis of the contract of therein and / or any information that may be relewhich may be payable and / or treat the policy vitime. I confirm that to the best of my knowledge hospitalised, undergone any surgery or treatment material for underwriting this proposal form, unlewith the regulatory requirements applicable to accompany to the contract of the contra	ther relevant terms and condition the Insurance between the Compount to enable the Company male oidable at the option of the Compount the Life Insured does not suffer fat, or he /she is involved in activitiess expressly stated in this Propound of the Compount / corporate agent / specified on issued by IRDAI from time to ti	s to the Propose pany and the Propose pany and the Propose pany subject to so rom any physica ies including any pesal. I also declar person / broker me. I confirm tha	and the Life Insured. I have also explained that the answers to poser / Life Insured, and if any untrue statement is contained lecision, the Company shall have the right to vary the benefits ection 45 of the Insurance Act, 1938 as amended from time to all or mental abnormality or handicap or has / had been whazardous avocation or occupation or any other information are and represent to the Company that I am in full compliance prescribed by the Insurance Act 1938, as amended from time to at I have verified the identity, current / permanent residential basis the Max Life AML moral hazard checklist.				
Is this a Replacement Sale? If yes, I have	adequately explained the c	onsequences	of replacement sale to the customer. $\square_{\mathrm{Yes}} \ \square_{\mathrm{No}}$				
Relationship of Principal Officer/Agent A with the Proposer/ Joint Life/ Life Insured	•						
Name of Principal Officer/Agent Advisor/	Specified Person						
Principal Officer/Agent Advisor/Specified	l Person Code						
Phone No. with STD Code							
Date:-		Place:-					
Signature / Thumb Impression / Electron Officer/Agent Advisor/Specified Person	ic Signature of Principal	Signature / Thumb Impression /Electronic Signature of Sales Manager					
We Confirm that we have made joint efforts in so confirm that the objective of sharing the commission			e for performing the service related to the policy. We further ward & recognition programs of the company.				
(Applicable only if more than one Agent Advisors share the commission.)							

Name(S) of Principal Officer/AA/Spec Person	Principal Officer/AA/Spec Person Code	Principal Officer/AA/Spec Person's Signature	% Share

Important Notes:

(1) Any payment/s including initial payment accompanying this proposal, cash or by bearer instrument must be made at any of the Company's General Office only. (2) Crossed cheque or bank drafts must be made in favour of MAX LIFE INSURANCE COMPANY LIMITED ACCOUNT (Proposal No. as above) may be handed over to the Agent Advisor.(3) Receipt of the Completed Proposal and initial payment does not create any obligations upon the Company to underwrite the risk. The Company shall not be liable until it has underwritten the risk and issued the Policy. If the Policy is sent by post it shall be deemed to have been delivered to and received by you in the ordinary course within 3 (three) days of posting. We draw your attention to Section-39, 45 and 41 of the Insurance Act, 1938, which reads as follows -

Section 39: In case nomination facility is availed, section 39 of the Insurance Act, 1938 as amended from time to time shall apply.

Section 45: No policy of life insurance shall be called in question on any ground whatsoever after the expiry of three years from the date of issuance of policy, from the date of the Commencement of Risk or Revival of the policy or the date of the rider to the policy, whichever is later. However, Insurer may question the Policy at any time within three years from the date of issuance of policy, from the date of Commencement of Risk or Revival of the policy or the date of the rider to the policy, whichever is later, onthe ground of fraud, in which case insurer shall inform Proposer/Life Insured/legal representatives in writing specifying the grounds and materials on which such decision is based. For other details please refer to Section 45 of the Insurance Act, 1938 asamended from time to time. Section 41: (1) No person shall allow or offer to allow, either directly or indirectly, as an inducement to any person to take or renew or continue an insurance in

respect of any kind of risk relating to lives or property in India, any rebate of the whole or part of the commission payable or any rebate of the premium shown on the policy, nor shall any person taking out or renewing or continuing a policy accept any rebate, except such rebate as may be allowed in accordance with the published prospectuses or tables of the insurer.

🛂 A Max Financial and 🖍 AXIS BANK JV

TRAD_STD_0522_5.8

		CKYC Annexure		
1. CENTRAL KYC REGISTRY Know Your Cu	stomer(KYC) Appl	ication Form Individual		
Application Type:	NEW			
KYC Number:				
2. PERSONAL DETAILS (Please refer instruc	tion A at the end)			
	Prefix	First Name	Middle Name	Last Name
Name(Same as ID proof)	Mr Shubham Jain			
Maidan Name(If any)				
Father/ Spouse Name	Sushil Kumar Jain			
Mother Name	Ms RACHNA JAIN	I		
Date Of Birth*	24/05/1994			
Gender	Male			
Marital Status	Single			
Nationality	Indian			
Resident Status	India			
Occupation Type	Salaried			
3.RESIDENCE FOR TAX PURPOSES IN JURIS	DICTION(S) OUTS	IDE INDIA		
Tax Identification number or Equivalent				
Country Code of Jurisdiction of Residence				
Place/City of Birth* :		Country	Code of Birth :	
4. PROOF OF IDENTITY/ADDRESS(Please ref	er instruction C at	the end)		
ID/Address proof name	Aadhar/UID Card			
ID/Address proof Number	**** **** 0122			
ID/Address Expiry date				
5. PROOF OF ADDRESS(PoA)*				
Address proof name	Aadhar/UID Card			
Address Line1	C-33/3 Sheetal Ku	nj Near Aashi Medical		
Address Line2	Shahensha Garde	n Bhopal		

Address Line3

City

State

PIN

Punjabi Bagh Gurudhwara

MADHYA PRADESH

Bhopal

462023

Country	INDIA	
6. Address in the Jurisdiction details where A	pplicant is Resident Outside India for Tax Purposes	
Overseas Address		
7. Contact Details		
Mobile Number	9977887336	
Email -ID	ShubhamJain0013@gmail.com	
8. APPLICATION DECLARATION		
therein immediately. In case of the abovit. I hereby consent to receiving informatio	ed above are true and correct to the best of my knowledge re Information is found to be false or untrue or misleading on the from Canral KYC Registry through SMS/Email on the ab	or misrepresenting. I am aware that I am be held liable for
Name/Date/Place		
Name of the applicant	Mr Shubham Jain	
Place	Bhopal	
Date	05/10/2022	
Propos	sal Form Annexure- Additional Questio	ns Annexure
	Proposer	Life to be Insured
Industry Type	Others TEXTILE INDUSTRY	
Defence/CRPF		
a. Are you currently posted in any sensitive/border location		
b. Your nature of job/role		
Aviation		
a. Exact Nature of duties		
b. If in Flying role what do you fly?		
Diving		
a. Are you a professional diver?		
Where do you dive?		
Oil and Natural Gas		
a. Are you based at offshore or your job involves travelling to offshore?		
Merchant Marine		
a. Type of vessel where working?		
Mining		
a. Does your role involves going inside any kind of mine?		
Have you ever had any illness related to your occupation?		
Nature of Duties/Business		
Are you/your Nominee a Politically Exposed F	Person (PEP)? Yes V _{No}	
If above Question "Yes" then answer below:		
a. Which of the following persons is PEP (Tick	k as applicable) Life insured Family member of I	fe insured
Specify:		
b. Please specify the extent of Political involv	ement:	
i. Political Experience (Years) : ii. Affiliation to Political Party :		
ii. Role in Political Party : Social Worker	MLA MP Others	
iv. Portfolio Handled :		
v. Whether Party in Power : Yes No		
c. Whether the concerned PEP has ever been	posted in foreign office/portfolio?	
Specify:		

d. Please specify all sources of income of concerned PEP? :	
e. Has the concerned PEP ever been convicted or is under any investigation for any crime punishable by 3 or more years of imprisonment?	: □ _{Yes}
Specify:	
Insurance History Annexure	
Do you have any Life, Disability, Critical Illness or Health Insurance policy issued/pending/lapsed with or any other insurance company?	Yes No
Has any proposal/reinstatement for life or health Insurance ever been refused, modified, postponed or offered with extra premium ? \Box Yes	s ✓ _{No}
Medical and Travel Questions Annexure	
In next 12 months you intend to travel or reside abroad other than on holiday of more than 4 weeks? Yes No	
Countries to be visited:	
Has any two (2) or more of your family members (Parents & Siblings) ever been diagnosed with Diabetes or Hypertension or Kidney Failure Heart Attack or any Hereditary Disorder before the age of 60? Yes No	or Cancer or
Have you ever been investigated/diagnosed or treated for any of the following? No Tobacco/Alcohol/Drugs Consumption: (In case you consume or have ever consumed) Yes No	
Tobacco/Alcohol/Drugs Consumption: (In case you consume or have ever consumed)	
COVID Questionnaire	
	NO
Are you a NRI?	NO
Have you or your family member ever tested positive for COVID 19 or awaiting results of such test or currently been advised to be under quarantine due to COVID 19?	NO
Are you currently suffering from persistent cough, shortness of breath/fever/rinohrrea/sore throat /malaise/Gastro-intestinal symptoms such as nausea, vomiting, diarrhoea etc. or in last 14 days have you been in contact with the individual suspected or confirmed to have COVID 19?	NO
Have you travelled outside India, in the last 30 days or do you intend to travel outside India within next 3 months?	NO
Are you working as a COVID warrior/ Health Care Worker (directly involved in service COVID diagnosed people/ Doctors/ Nurses/ Allied health care professional	NO