



INDIVIDUAL DEATH CLAIM FORM

For Office Use Only

Branch Name: _____ Branch Code: _____

Employee Name: _____

Employee Code: _____ Sign: _____

Date: D D M M Y Y Y Y Time: ☐ On or before 3PM ☐ After 3PM

Photograph of
Claimant

SECTION A*

POLICY DETAILS

Policy Number (s): _____

SECTION B*

DETAILS OF LIFE ASSURED (LA)

Name of Life Assured: ☐ Mr. ☐ Ms. F I R S T M I D D L E L A S T

Father's/Spouse Name: F I R S T M I D D L E L A S T

Date of Death: D D M M Y Y Y Y Time of Death: _____

Place of Death: ☐ Hospital ☐ Clinic ☐ Residence ☐ Office ☐ Other (Please specify): _____

Family Doctor: Name _____ Registration Number _____ Contact No. _____

Last treated/attended Doctor: Name _____ Registration Number _____ Contact No. _____

Last Employer details (If applicable):

Name of the Company _____ Name of contact person _____ Contact No. _____

Nature of Death ☐ Medical ☐ Natural ☐ Accident ☐ Murder ☐ Suicide

Cause of Death _____

Nature of Illness and Habit of the insured

Date of diagnosis of illness

☐ Hypertension ☐ Diabetes ☐ Heart disease ☐ Liver disease

☐ Kidney disease ☐ Cancer ☐ Other _____

☐ Smoking ☐ Tobacco ☐ Drugs, if yes, Duration of Consumption _____ & Quantity Consumed

Other Insurance details: (Life/Medicaid/Health)

Policy No.	Company Name	Sum Assured	Status (Active/Lapsed/Applied/Matured)	Claims status

DETAILS OF CLAIMANT

Claimant Name: F I R S T M I D D L E L A S T

Date of Birth: D D M M Y Y Y Y

Address: _____



Pincode: _____

Contact No.: _____

Office & / or Personal Email ID: _____

Relation with the Life Assured: ☐ Spouse ☐ Children ☐ Parents ☐ Others _____

Claimant's Title: ☐ Nominee ☐ Executor ☐ Trustee ☐ Appointee ☐ Employer ☐ Assignee ☐ Beneficiary

Claimant's PAN details: or ☐ Form 60

Politically exposed person: ☐ Yes ☐ No

US Person: ☐ Yes ☐ No (If Yes, please fill FATCA / CRS certification)

CLAIMANT NEFT MANDATE/ BANK ACCOUNT DETAILS

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

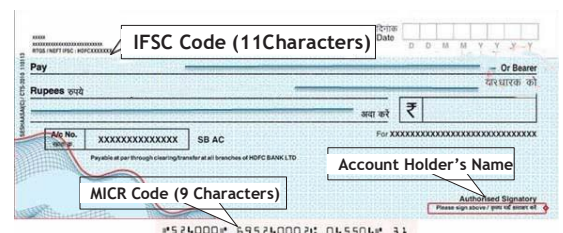
Bank Account No.: _____

Account Holder Name: _____

Bank Name & Branch: _____

Account Type ☐ Savings ☐ Current ☐ NRO ☐ NRE

IFSC: _____ MICR: _____



Blank space for companies to input product specific payout methods

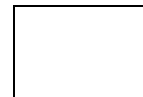
SECTION C*

DECLARATION AND AUTHORISATION

- I here declare all the details filled/furnished above are true correct to the best of my knowledge & belief.
- I hereby warrant the truth and correctness of the foregoing particulars in every respect, and I agree that if I have made or shall make any false or untrue statement, suppress or conceal any material fact, my right to claim reimbursement of the said expenses shall be absolutely forfeited.
- I understand and agree that the submission of this form does not mean that the request will be processed.
- I understand that any payout under the policy shall be strictly in accordance with the policy terms and conditions.
- Any payment shall be subject to realization of the last renewal premium payment.
- I authorise all the medical establishments (medical labs included), government institutions (police, revenue, etc.) to reveal the treatment information including HIV/AIDS and others, related to the LA, to MAX LIFE INSURANCE, from both the past and present.
- A photocopy of this declaration shall be considered as valid and effective.
- I authorise MAX LIFE INSURANCE to share and obtain information on behalf of me with any reinsurer, insurance association, medical authorities, other insurers, statutory authorities, employer, court, governmental body, regulator using an investigation agency or other service hereby provide my consent for the same.

Date:

Place: _____



Signature of Claimant

DECLARATION TO BE MADE BY A THIRD PERSON

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:

Place: _____



Signature of Third Person

Important Note: In case of any demand or favour asked by anyone including a company representative towards claim processing or settlement, the same should not be entertained and must be reported to the company immediately on the company's email id: claims.support@maxlifeinsurance.com

INSTRUCTION FOR FILLING UP THE FORM

A. IMPORTANT INFORMATION (Please read before filling the form)

1. The form should be filled by the claimant only. In case the claimant is a minor, the guardian/appointee may fill the form
2. Claims under multiple policies may be registered by filling a single form & providing all applicable policy numbers
3. In case of more than one claimant, separate forms need to be filled for each claimant
4. Please read the declarations carefully and the claimant should sign the claim form in the same manner as you normally sign your cheque
5. Claim is payable subject to fulfillment of all terms and conditions of the policy
6. No fee or commission should be paid to anyone to process this claim
7. Make sure your address, phone numbers and email ID are current and active as the correspondence will happen through this only
8. Asterisk (*) refers to mandatory information

B. DOCUMENTS TO BE SUBMITTED

MANDATORY DOCUMENTS

1. Original policy document (Not necessary in case of dematerialised policy document)
2. Death certificate issued by local authority
3. Claimant's PAN CARD
4. Claimant's passport size photograph
5. Cancelled cheque

ADDITIONAL DOCUMENTS

HOSPITALISATION/ DEATH DUE TO ILLNESS

1. Medical cause of death certificate
2. Medical records for all the treatments taken in the past. (Admission notes, History / Progress sheet, Discharge / Death summary, Test reports, etc.)
3. Claimant's passport size photograph
4. Cancelled cheque

ACCIDENTAL DEATH

First Information Report (FIR), Panchnama / Inquest report, Post-mortem report (PMR), Driving license, Police Final Report, Viscera report (if applicable) Newspaper cutting (s), if any, Others as applicable

Disclaimers: 1. Copies to be submitted and originals to be presented at the time claim submission,

2. MAX LIFE INSURANCE reserves the right to ask for more information/ documents, if required

C. LIST OF VALID IDENTITY & ADDRESS PROOFS (Please tick the document submitted)

PHOTO IDENTIFY PROOF (ANY ONE)

- ☐ Claimants PAN Card ☐ Valid Passport ☐ Voter ID
☐ Aadhar Card* ☐ Valid Driving License
☐ Bank Passbook with stamped photograph (not more than 6 months old)
☐ ID Card Issued by Central/State Govt. to employees
☐ Any other Central/State Govt. issued ID

ADDRESS PROOF (ANY ONE)

- ☐ Valid Passport
☐ Voter ID
☐ Aadhar Card*
☐ Valid Driving License
☐ Bank Passbook with stamped photograph (not more than 6 months old)

*I voluntarily provide my consent to use my Aadhar to conduct identity check towards KYC compliance by MAX LIFE INSURANCE.

D. NOTE: CLAIMANT NEFT MANDATE/ BANK ACCOUNT DETAILS

- A cancelled personalised cheque with the account no. and IFSC should be submitted along with the NEFT mandate. If the cheque is not personalised, a latest bank statement or copy of passbook (where account number and IFSC 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 (MAX LIFE INSURANCE) 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 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



CUSTOMER ACKNOWLEDGEMENT COPY-INDIVIDUAL DEATH CLAIM FORM

Policy No. _____ Claimant Name _____

Branch Name _____

Employee Name _____ Date _____

Employee Sign _____ Employee Code _____

BRANCH STAMP



Our virtual assistant
Chat with MILI
on our website



WhatsApp
Send 'Hi' to
+91 74283 96005



Login to manage your policy
maxlifeinsurance.com/customer-service



Write to us at
maxlifeinsurance.com/contact-us



Call us at 1860 120 5577



BEWARE OF SPURIOUS / FRAUD PHONE CALLS: IRDAI is not involved in activities like selling insurance policies, announcing bonus or investment of premiums. Public receiving such phone calls are requested to lodge a police complaint.