

Change of Ownership

Photograph of the New Owner to be pasted here

(Mandatory if annual premium

Policy No. 4682351111
I/We Srinivasan (Policyholder's name), wish to change
the ownership of my policy with Max Life Insurance bearing number
in favor of Mr/Ms/Mrs
The reason for change of ownership is
New owner's relationship with Life Insured
Name of policy's new nominee:
(to be filled if new owner and life insured are same)
Nominee's relationship with Policyholder
Date of birth of nominee (DD/MM/YYYY)
Name of Appointee (if nominee is a minor):
Appointee's relationship with nominee
Personal Details of New Policyholder
Current Residential Address :
City: Pin Code: Din
Contact Number:
Mobile Number : 7326518466
Email ID: Srinivasan@gntail.con
Date of Birth (DDMM/YYY):
Father's Name/ Husband's Name:
Gender: M F Smoker : Y N
Education:
Marital Status: Single Married Divorced
Nationality : Indian Foreign National NRI PIO
OccupationJob Title
Name of Company Nature of Business / Industry Type
Exact Nature of Dutiesper annum
Source of funds PAN No /Declaration in lieu of Pan
Is New Owner/Payee a Politically Exposed Person*? Yes / No (Please tick).
*Politically Exposed Persons (PEP) are individuals who are or have been entrusted with prominent public functions, for example Heads/Ministers of Central /State government, Senior politicians, Senior government/ judicial / military officers, Senior executive of state owned corporations, Important political party officials & immediate family member of above persons (Spouse, Children, Parents, Siblings, In-laws).



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Mandatory Questions to be Answered by New Policyholder		
Do you have a Max Life Insurance Policy or have you ever applied for one? Yes No		
If Yes, give policy/proposal number :		
I Authorise Max Life Insurance to send all communications by Email Yes No		
Bank A/C Details		
a) Bank Account No		
b) Bank & Branch Name		
c) IFSC Code		
Note: Kindly attach a cancelled cheque bearing account number and policyholder Name or copy of Bank Passbook		
I am the first class legal heir (Only in case of death of the policyholder) Yes No		
I hereby transfer the ownership of the Policy to the new Policyholder as mentioned above	I hereby agree to be the owner of the Policy and agree to abide by all the terms and conditions of the Policy including the declarations of the Proposal Form. I understand that the Company may use the information or share the information as disclosed above, for the pur pose for which the same is disclosed. I acknowledge the receipt of the original policy bond from the existing Policyholder. I hereby authorise Max Life to process my payouts to my Aadhaar linked bank account and to use the same to validate/update my KYC details. I accept to receive all future communication from Max Life Insurance vide email ID only (strike if you want to continue by hard copies). Signature of the new owner/ Authorised Signatory (in case of company or bank along with seal) Date: / /	
Witness details:		
Witness Sign (1)	Witness Sign (2)	
Name:	Name:	
Address:	Address:	
Documents attached with request-		
 □ Copy of self attested address proof (if annual p □ Copy of Date of Birth proof of new owner (in ca □ Self attested income document (if annual prem □ Self attested copy of Pan Card/ Declaration in I □ Death Certificate (in case of ownership change □ KYC disclosure format (If Assignee?? is other t □ Notarized Affidavit on Rs.100/- value stamp pa 	ise ownership change to individual other than Life insured) ium is >= Rs.1,00,000) ieu of PAN due to policy holder's death) than individual i.e. Trust, Partnership/Pvt. Ltd etc. per (Refer annexure 1 in case of employer employee case) n case of death of policyholder where new owner is other than Life insured	

Note: The Ownership change request would be considered complete only when the completely filled and signed form is submitted with all the required documents.