

REQUEST FOR CHANGE IN PERSONAL DETAILS



Policy Number

Date

Barcode

Name of Proposer

Contact Nos.

E-Mail ID

All fields are mandatory. (Atleast one contact no. is mandatory for processing your request. The Contact details mentioned above will be updated for all future communication)

Change in Name

☐ Proposer ☐ Life Assured ☐ Appointee ☐ Nominee (Please fill the Name as you want it to appear)

Note: Supporting proofs will have to be submitted as per norms [i.e. Marriage Certificate / Gazette Copy / Adoption Deed / Divorce Deed]

Change in Address

Note: Supporting address proofs will have to be submitted as per norms. [i.e. Utility bills / Bank statement / Passport / Driving Licence]

Change in Date of Birth

☐ Proposer ☐ Life Assured ☐ Joint Life Assured ☐ Appointee ☐ Nominee

DOB

Note: Supporting proofs will have to be submitted as per norms. [i.e. Birth Certificate / Driving Licence / Passport]

GUIDELINES

- DOB change is allowed only once in a policy lifetime.
- DOB changes are subject to underwriting.
- Change in DOB may lead to change in charges.
- In case of corrections, the fluctuation in ULIP policies (change in NAV) would be borne by the Company. In case of request from the customer for change in DOB, the fluctuation in ULIP policies (change in NAV) would be borne by the policy Holder.
- The increase in premium due to change in DOB, if any, has to be paid by the policy holder. The difference due to decrease in premium on change in DOB, if any, Shall be refunded to the policy holder post deduction of applicable charges.
- The taxes on the above would be applicable at the prevailing tax rates.
- The funds in the contract may change on rectification of DOB.
- Post Dob changes, in case the customer is not eligible for the product, a suitable plan, if any, would be offered as per our underwriting norms. If it is not possible to grant any other plan, Policy would be cancelled and would be refunded as per policy terms and condition.
- The above rules would be applicable to all other contracts held by the policy holder and changes would be effected in all, irrespective of specific request being received for these.

Request for Updating PAN

PAN Available

☐ Yes ☐ No

PAN Number

Name (as it appears on the PAN Card)

Document Submitted:

☐ PAN Card Copy ☐ Form 60 ☐ Form 61 ☐ Declaration in lieu of PAN

Request for updating GST (If available)

GST Number

Name (as it is registered under GST)

Document Submitted: GST registration certificate

I confirm that the GST number provided by me is correct.

Change in Residential Status

- Current residential status _____ New Residential Status _____ for taxation purpose for the current financial year _____ and here onwards.
- Document submitted for current address _____ (Copy of Passport / Driving License / Electricity Bill / Voter ID / Ration Card / Last 6 months Bank Statement/ Telephone Bill (Landline).
- In case of any further changes in my residential status, I shall inform the same to the company with the relevant documents.

Signature of Policy Holder (Proposer): _____

Signature of Assignee* / Trustee#: _____

(*Required in case of Absolute Assignment of Policy)
(#Required in case of Policy covered under MWPA)

Note: I have understood the meaning and scope of the change request form and take complete responsibility of the changes submitted by me. Any changes in the Policy / Personal Details are subject to the policy terms and conditions and relevant underwriting guidelines.

ACKNOWLEDGEMENT SLIP

This is to acknowledge the receipt of application for change in:

- ☐ Name ☐ Address ☐ Contact Details ☐ Email ID ☐ Date of Birth ☐ PAN number ☐ GST number
- ☐ Residential Status

Policy Number

Date

Received By

STAMP
&
TIME

DECLARATION

Applicable when the Proposer is illiterate or suffering from disability due to which writing is restricted or the proposer has signed in vernacular language. Note: Must be witnessed by someone other than the advisor/agent/employee of the Company.

I (Full name of Witness) _____ (Relation with Proposer) _____ adult and inhabitant of (Address) _____

do hereby declare that I have read and explained the contents of this form to the Proposer and he/she/they have understood the same.

Signature of Witness

FOR OFFICE USE ONLY:

ER Request submitted by C S CR CS

Spaarc Call ID _____

Date DDMMYYYY

Scanning Cabinet _____

Received By _____

Remarks _____

STAMP
&
TIME

Kindly call our Customer Service Number 1860-266-7766 (local charges apply)
Call Center timings: 10.00 A.M. to 7.00 P.M. Monday to Saturday (except national holidays)



Communication Address

ICICI Prudential Life Insurance Co. Ltd., Unit No. 1A & 2A, Raheja Tipco Plaza, Rani Sati Marg, Malad (East), Mumbai 400097.