

Application for Fund Switch & Premium Redirection Stay updated on your fund value with MyInsurance Set Alerts!

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Name of the Policy ov	wner:																									
Mobile No. Update (M	landatory):								Ema	ail id: .																
Fund Switch: (Fund S	Switch will	be ap	plicab	le to e	xistin	g fur	ds d	only a	and			mium														
not to future premium	n allocation	ıs)									appl	ly to fu	ture pr	remiu	ım o	nly ar	nd sh	nall	not a	pp	ly fo	or e	xistiı	ng fı	unds	
Fund Name	Ide	Segergated Fund Identification No. (SFIN)			1.	witch	1			Fund Name			Id		_	gate tion)		1	New %			
Assure	ULIF0100	08/07	7/05E	SLIAS	SURI	109	,				Ass	sure			ULI	F010	008/	07	/05E	BSL	IAS	SSU	RE1	.09		
Balancer	ULIF0093						-				_	ancer			_	F009										
Builder	ULIF0011	13/03	3/01E	SLBU	LDEF	2109					Bui	lder			_	F001										
Creator	ULIF0070	04/02	2/04E	SLCR	EATO	R109	9				Cre	ator			ULI	F007	04/	02	/04E	BSL	CRI	EAT	OR1	L09		
Enhancer	ULIF0021	13/03	3/01E	SLENI	HANC	E10	9				Enh	nancer			ULI	F002	213/	03	/01E	BSL	ENI	1AH	NCE:	109		
Enrich	ULIF0040						\top				Enr	rich			_	F004										
Growth	ULIF0050						9				Gro	wth			-	F005										
Income advantage	ULIF0150						\top				Inc	ome a	dvanta	age		F015										
Liquid Plus	ULIF0280										_	uid Plu			-	F028										
Magnifier	ULIF0082						\top				<u> </u>	gnifier			_	F008						_				
Maximiser	ULIF0110						\top				_	ximise	r			F011										
Multiplier	ULIF0121	17/10)/07E	SLINN	1ULTI	109					Mu	ltiplier			ULI	F012	217/	10	/07E	BSL	INN	4UL	TI10	09		
Nourish	ULIF0060	04/03	3/03E	SLNO	URIS	H109	9				-	urish				F006										
Protector	ULIF0031	13/03	3/01E	SLPR	OTEC	T109	9				Pro	tector			-	F003										
Pure Equity	ULIF0270						_				Pur	e Equi	ty			F027										
Super 20	ULIF0172						-					per 20	,			F017										
Value & Momentum											<u> </u>	ue & N	1omen	tum	-	F029										
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Total									10	0%	Tot	al													100)%
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Vernacular Declaration:	
I	, (name of the scribe) residing at
hereby confirm that the contents of the fo	rm was explained to Mr/Mrs/Ms. (Policy Owner) After fully
understanding the contents and information	on thoroughly, the above said proposer had signed in my presence on.
S	
Name of Scribe	Signature of Scribe
FATCA QUESTIONNAIRE	
A. Are you holding citizenship of any other	country? Yes No If yes, please provide country name/s:
B. Are you a tax resident of any other coun	try? Yes No If yes, please provide unique Tax Identification Number/s:
Note : If the response to any of the above	questions is yes, please submit a detailed NRI questionnaire available with our branch office.
Help us know you k	petter! For which financial goal did you choose your life insurance Policy?
For Your Family & You	For Efficient Financial Planning For Your Aspirations
Childs Education	Savings Wealth Creation
Childs Marriage	☐ Wealth Creation ☐ Retirement Planning
Family Protection & Risk	☐ Tax planning ☐ Legacy Planning for my Family
Protection against Health Risks	Business Continuity
Cover Outstanding Loans	
For Branch use only	
Branch Name:	ABSLI Staff's Name:
ABSLI Staff's Sign:	Inward Reg Sr Number: Date: D D M M Y Y Y Y Time: H H M M
Bank Account Details (All fields are mar	idatory)
PAN	
DAN should be furnished when your annual	contribution* is Rs. 50,000 or more in a financial year
	Dicies held by you as a customer + sum of all Top ups made in a financial year + any other payments made by you as a customer in the financial year
Bank Name:	Branch Name:
Bank Address:	
Bank Account Holder's Name:	
Bank Account Number:	11 Digit IFSC Code:
	(Value and get this eads from your hand)

Note: Aditya Birla Sun Life Insurance Company Limited (ABSLI) will not be responsible in case of non credit to your account or if transaction is delayed or not effected at all for reasons of incomplete/incorrect information provided or rejected by your bank. In case of requisite information for direct credit is not received or transaction rejected by bank the payout will be made vide cheque.

Mandatory Requirements

- $\bullet \ \ \, \text{Please submit is original required Cancelled Cheque with pre printed name \& account number}\\$
- Please submit pass book copy / Bank Statement bearing pre printed name, residence address & account number; incase cancelled cheque does not have printed name & account number, carry original for verification at branch
- In case the cancelled cheque carries pre-printed name and account number, but has "New Account" printed on it, kindly submit an attested copy of the passbook/bank statement bearing preprinted or handwritten name and account number. Please carry original passbook/bank statement to the branch for verification purposes
- Self attested valid ID proof, carry originals for verification at branch
- · All documents need to be self attested by the Policy owner & attested by ABSLI Authorized branch personnel.

Note: • Direct Transfers are not applicable for NRE accounts. • The bank account details will be linked to all your policies under your client id. • In case of changes made in existing bank account details, there will be a waiting period of 7 days from the date of registration of these changes before processing of any payout request.

Aditya Birla Sun Life Insurance Company Limited (Formerly known as Birla Sun Life Insurance Company Limited) Regn. No.: 109. Regd Office: One Indiabulls Centre, Tower 1, 16th Floor, Jupiter Mill Compound, 841, Senapati Bapat Marg, Elphinstone Road, Mumbai - 400013 +91 22 6723 9100 | CIN: U99999MH2000PLC128110 www.adityabirlasunlifeinsurance.com

Life Insurance

Aditya Birla Sun Life Insurance Company Ltd.



General Instructions

1.	Transaction will be effective.	if received and acce	pted at Aditya Birla	Sun Life Insurance Co	mpany limited	(ABSLI) Company	's office as below
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<u> </u>	<u> </u>
Monday to Friday on or before 3.00pm IST	At Unit Price declared on the same working day
Monday to Friday after 3.00pm IST and on Saturday	At Unit Price declared on the next working day

- 2. The ''Switch to'' fund option cannot be same as existing fund chosen.
- 3. The total percentage in a fund switch / premium redirection should add up to 100%, else the request will be treated as incomplete and will not be processed.
- 4. This application will be effective only if Aditya Birla Sun Life Insurance Company limited (ABSLI) officially accepts it.
- 5. Online request can be given with the help of CIP-TPIN codes or by calling our contact centre at our toll-free number 1-800-270-7000 anytime between 9AM and 9PM IST (Monday to Saturday). NAV applicability would be as per timing Stated in point no. 1.

Proof Submitted		
PAN Card (Mandatory) Driving License	Passport	Voter's Identity Card issued by Election Commission of India

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Life Insurance
Aditya Birla Sun Life Insurance Company Ltd.



Life Insurance

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Plan wise - Fund Details

I] In the following plans, only a single fund is allowed, hence switch request cannot be made for multiple funds. With your switch request the allocation will also move to that fund.

Plans	BSLI Flexi Secure Life Retirement I (Pension) Plans	BSLI Flexi Save Plus, BSLI Flexi Cash Flow, BSLI Flexi Lifeline, Single Premium Bond (10yrs)	BSLI Simply Life
Funds	Enrich, Growth, Nourish	Builder, Enhancer, Protector	Balancer, Enhancer

II] The following plans allow for Multiple funds. Kindly mention separately in the given form if you wish to also do a premium redirection for future premiums.

Plans	BSLI Classic Life I, Il	BSLI Gold Plus II	BSLI Supreme Life A/B, BSLI Seral Jeevan	BSLI Gold Plus I	BSLI Flexi Secure Life Retirement II Pension Plan	Protector, Builder and Enhancer (Application signed date Prior to 1st Jan 2010)	BSLI Freedom 58 (Application signed date Prior to 1st Jan 2010)
Funds Available	Builder Creator Enhancer Magnifier Protector	Assure Builder Creator Enhancer Income advantage Magnifier Maximiser Multiplier Protector Super 20	Assure Builder Creator Enhancer Income advantage Magnifier Maximiser Multiplier Protector	Assure Builder Creator Enhancer Magnifier Maximiser Protector	Enrich Growth Nourish	Assure Builder Creator Enhancer Magnifier Maximiser Protector	Builder Enhancer Income advantage Maximiser Protector

III] The following plans allow for Multiple funds. Kindly mention separately in the given form if you wish to also do a premium redirection for future premiums. The below plans have Guaranteed & Self-Managed Portfolio.

Plans with Guaranteed	BSLI Platinum Premier, BSLI Dream Products, BSLI Titanium Plus Plan
& Self-Managed Portfolio	Self-Managed
Funds Available	Assure, Builder, Creator, Enhancer, Income advantage, Magnifier, Maximiser, Multiplier, Protector, Super 20

Notes:-

Switching within Self-Managed Option allowed

Switching from Guaranteed Option to Self-Managed Option is allowed Switch from Self-Managed Option to Guaranteed Option is not allowed

For ABSLI Dream Products, ABSLI Saral Jeevan, ABSLI Platinum Premier & Titanium,

minimum fund switch required is for ₹5000/-

Funds available under Guaranteed Option:

(1) ABSLI Platinum Premier Plan - Platinum Premier Fund

(2) ABSLI Titanium Plan - Titanium Fund

(3) ABSLI Dream Products - Enhancer Guaranteed

IV] The following plans allow for Multiple funds. Kindly mention separately in the given form if you wish to also do a premium redirection for future premiums.

BSLI SARAL	SOLUTIONS	BSLI Freedom 58 (New Plan) (Application signed after 1st Jan 2010)				
LifeCycle Option (Risk Profile)	Guaranteed Portfolio	LifeCycle Option (Risk Profile)	Self-Managed Portfolio			
Conservative Moderate Aggressive	Enhancer	Conservative Moderate Builder Aggressive Creator	Assure			
			Enhancer, Income advantage, Magnifier, Maximiser, Multiplier, Protector, Super 20			

Notes:-

Switching is not allowed between Options

LifeCycle Option & Guaranteed Option

Can switch risk profile at any time and all policy premium paid from that point onwards will be invested as per risk profile chosen.

V] Plans were customer initiated switch in fund is not allowed

(1) Life Companion (2) Single Premium Bond (3) Platinum Plus, I, II, III & IV

Notes:-

Switching between LifeCycle Option to Self-Managed Option is allowed Switching within Self-Managed Option allowed

VI] In the following plans, multiple funds are allowed, You need to separately mention in the form in case you wish to also do a premium redirection for future premiums.

ABSLI Wealth Secur	e Plan & ABSLI Wealth Max
Life Cycle Option (Risk Profile)	Systematic Transfer Option
Conservative, Moderate, Aggressive	Assure, Builder, Creator, Enhancer, Income advantage, Liquid Plus, Magnifier

ABSLI Wealth Secure Plan & ABSLI Wealth Max						
Life Cycle Option (Risk Profile)	Systematic Transfer Option					
	Maximiser, Multiplier, Protector, Pure Equity, Super 20, Value & Momentum					

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Life Insurance

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