



Top-up Premium Request Form

Policyholder's Name:

Policy No.:

Mobile No.:

E-mail ID:

Kindly share a valid E-mail ID to receive progress update and closure confirmation on your request.

Please read all instructions before signing the form:

- Top-ups will be accepted as per the terms and conditions of your policy
- Any payment received would be allocated as Top-up only after appropriating such amount towards recovering the premiums, if any under your policy
- The Top-up premium will not change the Sum Assured guaranteed under the policy
- Top-up paid will be entitled to the tax benefits as per prevailing tax laws
- In case of Unit Linked Life Insurance plans and Universal Life plans, the company will accept the Top-up premium amount subject to the minimum of ₹ 1,000 and maximum of total amount of Top-up premium, not exceeding 25% of the total premiums received towards the base policy. However, there are no such maximum limits on Top-up premiums for pension plans without life cover
- Top-up will be allocated as per the existing fund
- All Top-up premiums and charges levied on Top-up premiums are subject to applicable taxes including service tax, which will be charged to the amount of the policyholder and will be recovered by cancellation of units at unit price
- Top-up premiums received after 3:00 p.m. will be allocated as per the NAV of next working day

Details of the Payment:

1 a. Amount paid: ₹ _____ Cash Cheque / DD Net Transfer

Rupees in words: _____

1 b. Payment details: Cheque / DD No.: _____ Dated: _____

Drawee Bank & Branch: _____

- Cash payment cannot exceed limit of ₹ 50,000/- per policy / per month including premium payment / Top-up / charges or any other payment
- In case the Top-up payment is ₹ 1 Lakh or more, please submit any one of the mandatory income documents stated below

2. Is policy owner / assignee / payee a Politically Exposed Person*?

Yes No (Please tick).

[*Politically Exposed Person (PEP) are the individuals who 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 and in-laws).]

Note: The relevant NAV and processing will be applicable from the date of complete requirements / documents received by Max Life Insurance.



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 through E-mail ID only (strike if you want to continue with hard copy).

"I / we understand that, I / we have disclosed my / our personal information (which may include Aadhaar related information) with Max Life for the purpose of providing insurance and related services and I / we hereby consent and authorise Max Life to use, store and / or share the same with government / regulatory / statutory bodies, Insurance repositories, reinsurers / hospitals or diagnostic centers / other Insurance companies for the purposes of underwriting assessment, claim investigation / settlement, KYC and policy servicing purposes, as per applicable law."

Signature of policy owner / assignee: _____

Acceptable income proofs:

- Latest Year ITR
- Latest Year Form 16
- Bank statement showing salary credit of last 3 months
- Balance Sheet and Profit and Loss Account
- Audited annual accounts of the proposer / payor
- Rental agreement
- Agriculture sales receipts
- Proof of proceeds of lump sum amount received from which premium is paid. For example, sale deed if premium is paid from the sale of property, proof of lump sum amount received at the time of retirement, proof of maturity of fixed deposits, mutual fund redemption, proof of other insurance policies maturity amount received, etc.



Acknowledgement Slip

Received with thanks a request for Top-up Premium Form on _____ (Date) at _____ a.m. / p.m. (Time).

Total amount received: ₹ _____

Net Premium towards Top-up: ₹ _____

Cheque / DD No.: _____



Max Life Insurance Customer Service Executive Name & Sign.: _____

#YouAreTheDifference™



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



Important: DO NOT believe in calls, SMS, E-mail offering discounts. For NEFT Payments, please transfer only to **"HSBC Bank A/C No. 1165 <Followed by 9 digit Policy No> IFS Code: HSBC0110002"**. Max Life does not collect Premium in any other account.

Max Life Insurance Co. Ltd.: Plot No. 90A, Sector 18, Gurugram, Haryana - 122 015.

Regd. Office: 419, Bhai Mohan Singh Nagar, Railmajra, Tehsil Balachaur, District Nawanshahr, Punjab - 144 533.

Fax: 0124-4159397, **CIN:** U74899PB2000PLC045626 | Customer Helpline Number: 1860 120 5577

IRDAI Registration. No. 104

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