

Please Note:

- Your request will be processed; provided the request form has been filled in completely and all mandatory documents have been submitted
- For Unit Linked Products, if application is received up to 15:00 hrs IST on a business/working day, the same days NAV will be applicable. However, if application is received after 15:00 hrs, then the next day declared NAV will be applicable
- In case of address change or contact details change request, please fill up a separate Policy Service Request Form and submit with valid address proof
- Max Life Insurance shall not be held responsible for delay or non-receipt of the cheque in case the postal address is incomplete / incorrect in company's records.
- Max Life Insurance 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 requisite information for direct credit is not received or transaction is rejected by bank the payout will be made vide cheque

Mandatory Documents Required for Processing Payout

- Original policy document submitted by the policyholder for Surrender request
- Self-attested valid copy of Photo ID proof (carry original for verification at Branch)
- Original cancelled cheque with pre-printed name & account number
- Pass book copy/Bank statement having pre printed name & account number in case cancelled cheque does not have pre printed name and account number (carry original for verification at Branch)
- Latest contact details & NRE bank statement reflecting any premiums paid from NRE account

Branch Mandatory Checklist

- All documents are original seen and verified by the Max Life Insurance personnel
- Received surrender request on _____ at am/pm _____
- Retention efforts made Yes No
- Reason for surrender _____
- Payout to the customer NEFT Cheque

Max Life or IRDAI, does not call/sms/e-mail, asking you to change your policy to other insurers, promising high returns. Stay Alert & Safe.

 Website www.maxlifeinsurance.com	 Email service.helpdesk@maxlifeinsurance.com	 Toll-free Helpline 1800 200 5577 9 AM - 9 PM Mon - Sat	 Facebook facebook.com/maxlife
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Max Life Insurance Co. Ltd. 3rd Floor, Operation Center, 90-A, Udyog Vihar, Sector-18, Gurugram -122015 (Haryana).

 A Max Financial Services and MS Joint Venture

Did you know? Buying a new insurance is expensive than insurance purchased at a younger age. Don't surrender! You can also opt for partial surrender or loan facility, to meet your fund requirements and continue with your policy, subject to the terms of your Policy document.

 Low Charges: In the Unit Linked Products, the charges reduce gradually over the years leading to a higher proportion of your premium being invested in the fund.	 High Growth Potential: ULIPS provide the option to invest in equity, which provides potential for higher growth of your funds
 Life Cover: Once the policy is surrendered the life cover ceases thus depriving you of the benefit when you actually need it.	 Tax Benefit: You can avail tax benefit under the section of the Income Tax Act 1961, subject to any further any amendment

NRI Declaration Form

If Non Resident (NR) as per Indian Income Tax Act 1961, please fill this form.

Particulars	Details
Country of residence	
If PAN is available (please provide)	
If Tax Residency Certificate (Certificate issued by Govt. of respective country)	
Signed form 10F (format attached)	
Permanent Establishment declaration (format attached)	

NOTE:

1. TDS would be applicable as per prevailing rate basis country of residency submission of above and compliance under provision of Section 10 (10D)/Section 10(10A) of the Income Tax Act, 1961.
2. In case of non-availability of PAN, no TDS certificate will be issued.

Date:

Place: _____

Signature of Policyholder