

## Application for Full/Partial Withdrawal of Units

(Please read the instructions carefully before proceeding)

Date- \_\_\_\_\_

Name of Policy Owner: \_\_\_\_\_

Policy No:

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Client ID: \_\_\_\_\_

Contact No. (Off/Res) \_\_\_\_\_ Mobile \_\_\_\_\_ email ID: \_\_\_\_\_ @ \_\_\_\_\_

I wish to Surrender/Withdraw my policy in full. I understand that the Surrender/Full Withdrawal of the units results in termination of the contract.

OR

I wish to apply for Partial withdrawal of amount Rs. \_\_\_\_\_ (Rupees \_\_\_\_\_) from my policy. I understand that the request will be processed if the withdrawal requested is greater than or equal to the minimum withdrawal amount mentioned in the policy document. The partial withdrawal should be from the units credited to my policy in the proportion given below

Name of the Fund	Amount/Percentage/Units

Signature of the Policy Owner

Please affix  
Re 1/-  
revenue  
Stamp &  
sign across  
the stamp

\_\_\_\_\_  
Name, Signature (& Rubber Stamp for Corporate/  
Firm) of Assignee in case of Absolute Assignment

**DECLARATION:** Applicable when policy owner is illiterate/ has signed in vernacular language or suffering from disability due to which writing is restricted I, hereby declare that I have explained the contents of this form to the Policy Holder in \_\_\_\_\_ language, that the Policy Holder has affixed his/her Signature / Thumb impression on the form in my presence, after fully understanding the contents thereof

Signature of Witness: -

Name: \_\_\_\_\_

Address: \_\_\_\_\_

\_\_\_\_\_

Name &amp; Signature of the Branch Official

Received Time: \_\_\_\_\_ Date: \_\_\_\_\_

Branch Code: \_\_\_\_\_

**Instructions:**

- Amount payable on surrender / partial withdrawal of the policy is as per the policy terms and conditions. Once requested, the partial withdrawal transaction cannot be cancelled
- In case your policy has been assigned, the partial withdrawal/surrender request would be accepted if the consent from the assignee of the policy is received.
- Partial withdrawals are not allowed in case of IndiaFirst Education Plan where the Policy owner is survived by a minor.
- If an application of partial withdrawal/full surrender is received up to 3:00 pm IST on a weekday (Mon-Fri), the same day's unit value will be applicable. However, if received after 3:00 pm IST on weekday, the next working day's unit value will be applicable (when the applicable day is not a valuation day, NAV of next immediate valuation day will be considered). Requests received after Friday 3 pm to Sunday will be allocated the NAV of the following Monday/following Working day
- Release of your withdrawal payout will be subject to realization of the last renewal premium payment made.

For any queries or more information, call

Toll Free **1800 209 8700**or mail us at [customer.first@indiafirstlife.com](mailto:customer.first@indiafirstlife.com)