

Refund Request Form

Request date: _____

Application/Policy No.: _____

Plan: _____

Sum Assured: _____

Transaction id _____

Select reason for and amount of refund

Reason	Amount	Reason	Amount
Pre- Issuance cancellation		Excess amount paid	
Free look cancellation*		Wrong/excess amount deducted*	
Stop payment of refund, cheque not received *			

Bank account details for direct credit
 Direct credit (Bank of Baroda and Andhra Bank only)

 NEFT/ RTGS

 NRE/NRO

Bank name		Bank branch	
Account holder's name			
Account number		Type of account	
MICR code		IFSC code	
Mobile number		Phone number	

Mandatory documents to be enclosed:

- **Cancelled cheque with IFSC code for direct credit of money to NEFT/ RTGS , NRE/NRO Accounts**
- **Original policy document for 'free look' cancellation**

Customer address

Name			
Mailing address			
Landmark			
City			
State		Pin Code	

I confirm that the details provided above are true and correct. I authorize IndiaFirst to deduct from my premium amount towards stamp duty, mortality charges and medical charges as applicable. I also authorize them to re-purchase the units under my plan at the same price as on the day* this request is processed in the system.

 Policyholder's signature

 Branch Official 's signature & Stamp
 (Employee code)

NOTE

- Calculation of unit value

Time of receiving request for cancellation	Unit value
If received before 3:00 pm between Monday to Friday	Closing unit price of that day
If received between 3:00 pm on Friday and Sunday	Closing unit price of the following business day

- In case of a free look change of a unit linked product, the unit value as on the date the request is processed in the system will be considered
- Any NAV fluctuations as a result of the free look change/ refund will be passed on to the policyholder.
- Company reserves the right to use any alternate mode of payment
- If the transaction is delayed or not effected at all for any reasons due to incomplete or incorrect information, I shall not hold the company responsible in any manner whatsoever.
- Further, I understand that the company shall not be held responsible for any non receipt of payment on account of wrong/ incorrect/ incomplete information given by me in this form.
- Stop payment of refund cheque would be subject to non clearance of amount by the Bank.
- Direct credit would be processed on confirmation of stop payment by the Bank.