

Top-Up Request Form

(Please read the instructions carefully before proceeding)

Date:

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Name of the Policyholder: _____

Policy No:

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Client id: _____

Contact No. (Off/Res): _____ Mobile: _____ Email Id: _____ @ _____

I would like to pay an additional top-up amount of Rs. _____ (Rupees _____) through Cash/ Cheque

/ Demand draft No. _____ dated _____ drawn on _____ Bank to be invested.

(Please tick the appropriate option)

 As per existing fund allocation**OR** In funds as mentioned in the table below:

Product	Fund Name	SFIN	Allocation (In Percentage)
<input type="checkbox"/> IndiaFirst Savings Plan (UIN - 143L004V01)	Equity Fund <input type="checkbox"/>	ULIF001161109EQUITYFUND143	
	Debt Fund <input type="checkbox"/>	ULIF003161109DEBTFUND00143	
<input type="checkbox"/> IndiaFirst Education Plan (UIN - 143L002V01)	Balanced Fund <input type="checkbox"/>	ULIF005161109BALANCEDFN143	
<input type="checkbox"/> IndiaFirst Future Plan (UIN - 143L003V01)	Equity Fund Pension <input type="checkbox"/>	ULIF002161109EQUFUNDPEN143	
	Debt Fund Pension <input type="checkbox"/>	ULIF004161109DEBFUNDPEN143	
	Balanced Fund Pension <input type="checkbox"/>	ULIF006161109BALFUNDPEN143	

I further confirm that the premium paid above is derived out of legitimate sources of funds.

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Signature of the Policyholder

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Name and Signature of the Branch Official

Date: ____/____/____

Received Time: _____

Branch Code: _____

Instructions:

- The allocation percentage, if specified above is applicable only for top-up premium and not regular premium.
- Funds are product specific. The minimum Top up amount is Rs. 5000 for IndiaFirst Education Plan & IndiaFirst Savings Plan and Rs. 2000 for IndiaFirst Future Plan. For further details kindly refer to the terms and conditions of the policy document.
- If the top-up amount premium exceeds Rs. 10,000 please submit an address proof and identity proof.
- If the amount of top up is equal to or more than Rs. 1,00,000/- then the Income Proof reflecting the source of funds for the top-up amount is required.
- If the top up amount plus the aggregate regular premium payable in the financial year is greater than or equal to Rs. 50,000 please submit PAN card copy.
- Top up premiums will be accepted only when the regular premiums due are paid up to date. If the renewal premium of the policy is due and unpaid, the amount paid will be first adjusted towards the same. The balance, if any can be used towards top up.
- Top up requests cannot be processed in case the policy is lapsed/surrendered/paid up.
- If a top up request application is received up to 3:00 p.m. IST on a weekday (Monday-Friday), the same day's unit value will be applicable. However, if received after 3:00 p.m. 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 p.m. to Sunday will be allocated the NAV of the following Monday/following Working day
- Kindly consult your Tax consultant on the implication of Section 10 (10D) and section 80C of the Income Tax Act, 1961 on this transaction.

Address: IndiaFirst Life Insurance Company Limited
301, 'B' Wing, The Qube, Infinity Park,
Dindoshi - Film City Road, Malad (East),
Mumbai - 400 097.
IRDA Reg. No. 143

Insurance is the subject matter of Solicitation.

For any queries or more information, call

Toll Free 1800 209 8700

or mail us at customer.first@indiafirstlife.com