

Request Date:

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Plan Name: _____

Application/Policy No.: |

Transaction Id: |

Select Reason For and Amount of Refund

Reason	Amount	Reason	Amount
Pre- Issuance Cancellation		Excess Amount Paid	
Free Look Cancellation*		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

Bank Name		Bank Branch	
Account Holder's Name (As per Bank records)			
Account Number		Type of Account	☐ Saving ☐ Current ☐ NRE/NRO
MICR Code ^{**}		IFSC Code [*]	
Mobile / Phone Number		Email	

Customer's Address

[illegible]

I/ We hereby confirm that the details provided above are true and correct. I/ We 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. If the transaction is delayed or not affected 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.

Policyholder's Signature

Branch Official 's Signature and Stamp
(Employee Code)

Important Notes

- The Company reserves the right to use any alternate mode of payment.
- Cancelled cheque of the given account number is mandatory document to be enclosed.If the cheque copy submitted doesn't contain name/account number ,then kindly submit bank statement /passbook duly signed by account holder with details of name and account number
- If the premium is paid online, and a request for refund of the same is made to the Company, the Customer shall not to approach the Bank for cancellation of amount charged to Credit Card
- *Free-Look Cancellation:
 - Original policy document to be enclosed for 'free look' cancellation
 - 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.
- **Stop Payment of Refund, Cheque Not Received:
 - 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.
- [†]IFSC code is mandatory for credit via NEFT /RTGS transactions
- [‡]MICR code is mandatory for credit for ECS payouts
- [^]Day : Calculation of Unit Value for the day

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