



**Bank Account Details** (All fields are mandatory)

Pan Card Number

UID Number

PAN should be furnished when the customer's annual contribution\* is Rs. 50,000 or more in a financial year

\*Annual contribution would mean total Annual premium across all policies held by the customer + sum of all Top ups made in a financial year + any other payments made by the customer in the financial year

Bank Name:

Bank Address:

Bank Account Holder's Name:

Bank Account Number:

11 Digit IFSC Code:

(You can get this code from your bank)

**Note:** Birla Sun 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 of requisite information for direct credit is not received or transaction rejected by bank the payout will be made vide cheque.

**Mandatory Requirements**

- Please submit Original Cancelled Cheque with pre printed name & account number
- Please submit pass book copy / Bank Statement bearing pre printed name, residence address & account number; incase cancelled cheque does not have printed name & account number, carry original for verification at branch
- In case the cancelled cheque carries pre-printed name and account number, but has "New Account" printed on it, kindly submit an attested copy of the passbook/bank statement bearing preprinted or handwritten name and account number. Please carry original passbook/bank statement to the branch for verification purposes
- Valid address KYC proof, carry originals for verification at branch
- Self attested valid ID proof, carry originals for verification at branch
- All documents needs to be self attested by the Policy owner & attested by BSLI Authorized branch personnel.

**Note:** • Direct Transfers are not applicable for NRE accounts. • The bank account details will be linked to all your policies under your client id. • In case of changes made in existing bank account details, there will be a waithing period of 30 days from the date of registration of these changes before processing of any payout request.

**Valid Photo ID Proofs**

- Passport
- Pan Card
- Voter's Identity Card
- Driving License
- PIO card with photograph
- Bankers Certificate with photograph
- Employer's Certificate with photograph
- Valid Debit / Credit Card with photograph
- Employees ID Card with photograph
- ESIC card with photograph
- Armed Force ID cards with photograph
- Post office savings A/c, PPF Account with photograph
- Bar Council ID for Lawyers with photograph
- Letter from a recognized public Authority or public servant on individual/department letter head with stamp/seal verifying the identity of the customer.
- Aadhar ID (UID)

**Valid Photo KYC Proofs**

- Telephone Bill / Mobile Bills (Not older than 6 months)
- Electricity Bill (Not older than 6 months)
- Bank Statement / Employer's Letter (Not older than 6 months)
- Passport Copy
- Letter from a recognized public Authority or public servant on individual/department letter head with stamp/seal verifying the residence of the customer
- Ration card
- Lease agreement + rent receipt (not older than 3 months from the date of acceptance)

**PLAN WISE - FUND DETAILS**

I] In the following plans, only a single fund is allowed, hence switch request cannot be made for multiple funds. With your switch request the allocation will also move to that fund.

<b>Plans</b>	BSLI Flexi Secure Life Retirement I (Pension) Plans	BSLI Flexi Save Plus, BSLi Flexi Cash Flow, BSLI Flexi Lifeline, Single Premium Bond (10yrs)	BSLI Simply Life
<b>Funds Available</b>	Enrich, Growth, Nourish	Builder, Enhancer, Protector	Balancer, Enhancer

II] The following plans allow for Multiple funds. Kindly mention separately in the given form if you wish to also do a premium redirection for future premiums.

<b>Plans</b>	BSLI Classic Life I, II	BSLI Classic Life Premier, BSLI Gold Plus II	BSLI Prime Life, BSLI Prime Life Premier, BSLI Supreme Life A/B, BSLI Seral Jeevan	BSLI Gold Plus I	BSLI Flexi Secure Life Retirement II Pension Plan	BSLI Children's Dream Plan / BSLI Dream Plan (Application signed date Prior to 1st Jan 2010)	BSLI Freedom 58 (Application signed date Prior to 1st Jan 2010)
<b>Funds Available</b>	Builder Creator Enhancer Magnifier Protector	Assure Builder Creator Enhancer Income advantage Magnifier Maximiser Multiplier Protector Super 20	Assure Builder Creator Enhancer Income advantage Magnifier Maximiser Multiplier Protector	Assure Builder Creator Enhancer Magnifier Maximiser Protector	Enrich Growth Nourish	Assure Builder Creator Enhancer Magnifier Maximiser Protector	Builder Enhancer Income advantage Maximiser Protector

III] The following plans allow for Multiple funds. Kindly mention separately in the given form if you wish to also do a premium redirection for future premiums. The below plans have Guaranteed & Self-Managed Portfolio.

<b>Plans with Guaranteed &amp; Self-Managed Portfolio</b>	BSLI Platinum Premier, BSLI Dream Products, BSLI Titanium Plus Plan
	Self-Managed
<b>Funds Available</b>	Assure Builder Creator Enhancer Income advantage Magnifier Maximiser Multiplier Protector Super 20

**Notes:-**

Switching within Self-Managed Option allowed  
Switching from Guaranteed Option to Self-Managed Option is allowed  
Switch from Self-Managed Option to Guaranteed Option is not allowed  
For BSLI Dream Products, BSLI Saral Jeevan, BSLI Platinum Premier & Titanium, minimum fund switch required is for ₹5000/-

Funds available under Guaranteed Option:

- (1) BSLI Platinum Premier Plan - Platinum Premier Fund
- (2) BSLI Titanium Plan - Titanium Fund
- (3) BSLI Dream Products - Enhancer Guaranteed

IV] The following plans allow for Multiple funds. Kindly mention separately in the given form if you wish to also do a premium redirection for future premiums.

BSLI SARAL SOLUTIONS		BSLI Freedom 58 (New Plan) (Application signed after 1st Jan 2010)	
LifeCycle Option (Risk Profile)	Guaranteed Portfolio	LifeCycle Option (Risk Profile)	Self-Managed Portfolio
Conservative Moderate Aggressive	Enhancer	Conservative Moderate Builder Aggressive Creator	Assure  Enhancer Income advantage Magnifier Maximiser Multiplier Protector Super 20

**Notes:-**

Switching is not allowed between Options LifeCycle Option & Guaranteed Option  
Can switch risk profile at any time and all policy premium paid from that point onwards will be invested as per risk profile chosen.

[V] Plans were customer initiated switch in fund is not allowed

- (1) Life Companion
- (2) Single Premium Bond
- (3) Platinum Plus, I, II, III & IV

**Notes:-**

Switching between LifeCycle Option to Self-Managed Option is allowed

Switching within Self-Managed Option allowed

VI] In the following plans, multiple funds are allowed, You need to separately mention in the form in case you wish to also do a premium redirection for future premiums.

BSLI Wealth Secure Plan & BSLI Wealth Max	
Life Cycle Option (Risk Profile)	Systematic Transfer Option
Conservative Moderate Aggressive	Assure Builder Creator Enhancer Income advantage Liquid Plus Magnifier

BSLI Wealth Secure Plan & BSLI Wealth Max	
Life Cycle Option (Risk Profile)	Systematic Transfer Option
	Maximiser Multiplier Protector Pure Equity Super 20 Value & Momentum