



jeevan suraksha ka
naya nazariya

1800-102-4444

www.bharti-axalife.com

SMS SERVICE to 56677
We will be in touch within 24 hours
to address your query

Fund Switch and Premium Redirection Form

Policy Details

Kindly fill in BLOCK LETTERS only.

Policy Number: -

Name of Plan:

Name of Policyholder:

First Name Middle Name Last Name

Are you a US Citizen or US tax resident Yes No) If Yes, Please provide TIN: _____

Policyholder Contact Details

Landline No. (Residence): - *Mobile No.: (Mandatory)

Landline No. (Office): - Email ID: _____

STD Phone

All communications will be on the e-mail id mentioned above (if available). The mode of communication from and to the company would include electronic mode like sms, email etc.

Please tick 'Physical copy' if you want to receive communication in electronic form as well as physical Copy

Physical Copy:

[A] Fund Switch Details

*Switch of funds will be applicable to accumulated funds only and not for future premiums.

Fund Name	Switch from % of current allocation to be switched out	Percentage switch to						Row total (i.e. Switch to total should be 100%)
		Grow Money	Steady Money	Build India Fund	Save 'n' grow Money	Safe Money	Growth Opportunities	
Grow Money*								100%
Steady Money*								100%
Build India Fund								100%
Save 'n' grow Money*								100%
Safe Money*								100%
Growth Opportunities								100%
Total								100%

(Please read the Instructions/Notices mentioned overleaf before filling up this form.) *For pension plan, Grow Money should be read as "Grow Money Pension", Steady Money as "Steady Money Pension", Save 'n' grow Money as "Save 'n' grow Money Pension", Safe Money as "Safe Money Pension" and Growth Opportunities as "Growth Opportunities Pension". *Growth Opportunities Fund is not available in Bharti AXA Life's Spot Suraksha plans. For policy issued on or after 1st Jan 2010, the Grow Money Fund should read as "Grow Money Plus", Growth Opportunities Fund should read as "Growth Opportunities Plus". For pension plans Grow Money should read as "Grow Money Pension Plus", Growth Opportunities should read as "Growth Opportunities Pension Plus."

[B] Premium Redirection Details

*Redirection of funds will be applicable to future premiums only and not for accumulated funds.

Fund Name	Percentage to be allocated
Grow Money*	%
Steady Money*	%
Save 'n' grow Money*	%
Safe Money*	%
Growth Opportunities	%
Total	100%

*For pension plan, Grow Money should be read as "Grow Money Pension", Steady Money as "Steady Money Pension", Save 'n' grow Money as "Save 'n' grow Money Pension", Safe Money as "Safe Money Pension" and Growth Opportunities as "Growth Opportunities Pension".

*Growth Opportunities Fund is not available in Bharti AXA Life's Spot Suraksha plans.

For policy issued on or after 1st Jan 2010, the Grow Money Fund should read as "Grow Money Plus", Growth Opportunities Fund should read as "Growth Opportunities Plus". For pension plans Grow Money should read as "Grow Money Pension Plus", Growth Opportunities should read as "Growth Opportunities Pension Plus."

Are you making your renewal premium payment along with the premium redirection request? Yes No

If yes, the current premium to be invested as per Existing Allocation New Allocation as indicated in the above table

(Please read the Instructions/Notices mentioned overleaf before filling up this form.)

