



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

Top-up Premium Request Form

(Please submit separate request form for each Policy)

Personal Details

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:

Top-up Details (Kindly Submit The Request Form At Our Local Branch Office)

I would like to pay an additional amount of ₹ _____
(in words) towards Top-up Premium by (Tick as applicable)

<input type="checkbox"/> Cash	Denominations	1000 X =	500 X =	100 X =
		50 X =	20 X =	10 X =
TOTAL AMOUNT (Rs.)				

Cheque Demand Draft

Cheque/DD No.	Dated	Drawee Bank & Branch	Amount (In Figures)
			₹ _____

NOTE

- Cheque/DD should be made payable to "Bharti AXA Life Insurance Company Limited"
- Should you choose to pay the Top-up Premium by cash you are advised to deposit the same at the nearest branch office of the Company. You are advised not to hand over cash to our sales representative. The Company shall not be held responsible for any risk/loss arising out of the customer handing over any money to any location other than branch offices of the Company.

Kindly allocate my Top-up Premium in the following proportion:

(Choosing a fund is mandatory) (Total allocation across all funds = 100%)

Fund Name [®]	Fund Allocation (%)
Grow Money Fund/Grow Money Pension Fund	
Save'n'grow Money Fund/Save'n'grow Money Pension Fund	
Steady Money Fund/Steady Money Pension Fund	
Growth Opportunities/Growth Opportunities Pension Fund	
Safe Money/Safe Money Pension Fund	
Build India Fund	
Total	100%

@Grow Money Fund, Save'n'grow Money Fund and Steady Money Fund, Growth Opportunities, Safe Money are available with all products except Bharti AXA Life - DreamLife Pension. Grow Money Pension Fund, Save'n'grow Money Pension Fund and Steady Money Pension Fund, Growth Opportunities Pension, Safe Money Pension are available only with Bharti AXA Life - DreamLife Pension. 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"

ACCEPTABLE LIST OF INCOME PROOF/S (Tick as applicable):

Income tax assessment orders/Income tax return OR Employer's certificate (not more than one month old) OR Audited accounts (latest) OR Form 16 in case of employed individuals (latest) OR Certified salary slip from reputed private/public limited/public company (less than 3 months old) OR Agricultural Income Certificate (not more than 3 months old) OR Agricultural land details/records and income assessments (latest) OR Bank Cash-flows statements or copy of pass book (not more than 6 months old and valid) OR Chartered Accountant's certificate (not more than one month old) OR Pensioner pass book (not more than 6 months old and valid). The pensioner account statement should depict at least 2 transactions apart from opening and closing balance in the last 6 months OR Registered rent agreement within the last 11 months along with latest rent receipts (can be collected only in cases where it is established that the Customer's sole source of regular income is rental income) provided Customer submits a declaration stating that "I have no other regular source of income other than the rental income" .

Declaration

I hereby confirm that I have read and understood all the relevant Policy provisions before making this application and I do hereby confirm that the premium paid above is derived out of legitimate sources.

Thumb Impression/Signature
of the Policyholder

Place: _____

Date:

Vernacular Declaration

DECLARATION* IN CASE THIS TOP-UP PREMIUM REQUEST FORM IS FILLED BY A PERSON OTHER THAN THE POLICYHOLDER OR SIGNED IN VERNACULAR LANGUAGE:

Declaration by Policyholder:

I hereby declare that the contents in this form have been fully explained to me and I declare that whatever is stated hereinabove has been recorded as per the information provided by me.

Thumb Impression/Signature of the Policyholder

Declaration by person filling the form:

I have explained the contents of this form to the Policyholder in _____ language and I have correctly recorded the answer provided to me. I further declare that the Policyholder has signed/affixed his/her thumb impression in my presence.

Declarant's Name:

Declarant's Address:

City: State Code: PIN:

Date of Birth:

Declarant's Signature:

Place: _____

Date:

**The person giving this declaration can be any person other than Introducing Advisor or MOA or MOM"

Top-up Limits And Charges

For details on Top-up limits, charges, entry years, etc., please refer your policy bond.

Note:

- If the above Top-up amount plus the aggregate premium payable in the financial year is equal or exceeds ₹ 2 lakhs (in case of regular premium Policy) and ₹ 1 lakh (in case of single premium Policy and NRI customers), then please enclose self-attested copies of the income proof (please see overleaf for list of income proofs). The income proof is not required to be submitted if it is provided earlier
- The above specified allocation is applicable only for Top-up Premium amount and not for regular premium
- The aforesaid Top-up Premium allocation instruction would not change the allocation for any earlier regular/Top-up Premium payment (if any)
- If the total allocation of all funds is not equal to 100%, then the form will be returned back to the Policyholder. In such a scenario, a fresh Top-up form will need to be filled to define a new allocation
- Minimum allocation percentage in any fund (if chosen) is 5%
- Top-up Premium will not be accepted if there is/are any unpaid regular premium/s
- This application will be effective only if it is duly signed & stamped by Bharti AXA Life Insurance Company Limited
- The Top-up amount will not change the Sum Assured under the Policy except for Bharti AXA Life - InvestConfident, where with every Top-up amount the Sum Assured will increase by 125% of the Top-up amount
- Allocation of Top-up Premium is subject to Top-up allocation charges (if any). Please refer to your policy bond for more details
- Please consult your Tax Advisor/Chartered Accountant/Financial Advisor for Top-up related taxation information
- Service tax and cess will be charged on Top-up allocation charge as per the prevailing tax rates
- Insurance is the subject matter of the solicitation
- Income proof is mandatory for Politically Exposed Persons

NAV Applicability

Day	Time	NAV applicable
Monday - Friday	Up to 3:00 p.m.	Same Day
Monday - Friday	After 3:00 p.m.	Next Working Day
Saturday - Sunday	Any Time	Next Working Day

(In case of a public holiday between Monday and Friday, the next working day's NAV will be applicable.)



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Bharti AXA Life Insurance Company Ltd.

Regd. Office: Unit 601 & 602, 6th Floor, Raheja Titanium, Off Western Express Highway, Goregaon (E), Mumbai - 400 063. Regn. No.: 130. Comp-Oct-2010-1115

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