

# Application for Fund Switch and Premium Redirection

(Please read the instructions carefully before proceeding)

Date:

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Name of Policy Owner: \_\_\_\_\_

Policy No:

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Client ID: \_\_\_\_\_

Contact No. (Off/Res): \_\_\_\_\_ Mobile: \_\_\_\_\_ Email ID: \_\_\_\_\_ @ \_\_\_\_\_

## Fund Switch

Fund Switch is a transaction, which allows you to change the allocation of the existing funds. This transaction would be applicable for your existing funds, your future premiums will continue to be allocated in the same proportion as it currently exists.

I wish to switch the value of units credited to this policy as indicated below:

From (Existing Fund Name)	To (New Fund Name)	Percentage/Amount/Units to be Switched

## Instructions:

- The minimum switch amount is Rs 5000.
- To bring a switch into effect, the required number of units will be withdrawn from one fund at the applicable fund value of that fund, and new units will be created in the desired fund(s) at the applicable unit value.
- If a switch request application is received up to 3:00 p.m. on a weekday (Monday-Friday), the same day's unit value will be applicable. However, if received after 3:00 p.m. 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 pm to Sunday will be allocated the NAV of the following Monday/ working day.
- If the policy has been assigned, the switch request would be accepted if the consent from the assignee of the policy is obtained.
- A fund switch is not allowed for lapsed policy.

## Premium Redirection

Premium Redirection allows you to redirect your future regular premiums into a different allocation pattern than your current allocation pattern. However, this will not affect your current investments.

I wish to allocate my future premiums as indicated below

Name of the Fund	Percentage
Total	100%

## Instructions:

- Allocation of future premium would be effective from next premium paid or due date, whichever is later.
- Please ensure that the future premium allocation totals to 100%.
- Please note that in case your Policy has been assigned, the Premium Redirection request would be accepted only if the consent from the Assignee of the Policy is received.

Signature of the Policyholder Policy Owner

Name and Signature of the Branch Official

Received Time: \_\_\_\_\_ Date: \_\_\_\_/\_\_\_\_/\_\_\_\_

Branch Code: \_\_\_\_\_

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](mailto:customer.first@indiafirstlife.com)