

APPLICATION FOR FUND SWITCH / PREMIUM REDIRECTION

CONDITIONS TO BE READ BEFORE FILLING THE FORM:

1. This form needs to be filled by the policyholder himself/herself in BLOCK LETTERS in black or blue ink.
2. In case of switching the funds from Top-Up account kindly fill in the fund switch details in the Top-Up A/C Form.
3. If this application form is received by 3.00 p.m. on a working day, switch shall be effected at the applicable price declared on the same day.
4. If the application form is received after 3.00 p.m. on a working day, switch shall be effected at the applicable price declared on the next Trading day.
5. This application will not be effective until it is officially accepted by Kotak Mahindra Old Mutual Life Insurance Limited.
6. The switch will not affect your future premium allocation, only the current holding shall be switched as per the request.
7. **Two Financial Transaction cannot be processed on same day.**
8. Fund Switch / Premium Redirection is not permissible for any policy in lapsed & notice period status.

Policy No.:	<input type="text"/>	Product Code (To be filled by BOE)	<input type="text"/>
Name of Policyholder / Life Assured	Date:		<input type="text"/>
Title	Surname	First name	Middle name
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Contact Details:	<input type="text"/>	Email ID:	<input type="text"/>

Do your bit for green world & Switch to e-communication. Kindly mark if you would like to receive your communication through electronic mode.

PART 1 - FUNDS SWITCH

- Notes:**
1. In case of switching in to SSS - Kotak Money Market Fund, Systematic Switching Strategy has to be activated. Main Account Top Up Account
 2. Switch in to SMMF - Kotak Money Market Fund from SCOF - Kotak Classic Opportunities fund & SFEF - Kotak Front line Equity Fund is not allowed.
 3. In case of switch out from SMMF, Systematic Switching Strategy (SSS) will be applicable on the remaining fund value & the strategy would continue.
 4. SSS Option will not be available for Top-Up Premiums.

Fund Codes	Fund Description	From (%)	To (%)
FMMF	Kotak Money Market Fund		
FCOF	Kotak Classic Opportunities Fund		
FFEF	Kotak Front line Equity Fund		
KBDF	Kotak Dynamic Bond Fund		
FBLF	Kotak Balanced Fund		
SMMF	SSS - Kotak Money Market Fund		
SCOF	SSS - Kotak Classic Opportunities fund		NA
SFEF	SSS - Kotak Front line Equity Fund		NA
Total			100%

PART 2 - PREMIUM RE-DIRECTION

Fund Codes	Fund Description	Allocation%
FMMF	Kotak Money Market Fund	
FCOF	Kotak Classic Opportunities Fund	
FFEF	Kotak Front line Equity Fund	
KBDF	Kotak Dynamic Bond Fund	
FBLF	Kotak Balanced Fund	
SMMF**	SSS - Kotak Money Market Fund	
Total		100%

2A. ** ACTIVATION OF SYSTEMATIC SWITCHING STRATEGY (SSS)

If SMMF Fund is selected on Premium Re-direction, Systematic Switching Strategy (SSS) facility will get activated.

Please confirm whether you wish to activate the SSS facility Yes

Notes: 1. The minimum allocation amount for activating SSS should be Rs.25,000.

For example, if premium amount is Rs.50,000/- client should not put less than 50% in SMMF to activate the SSS facility.

2. Activation of the Systematic Switching Strategy would be effective from next policy anniversary.

3. On activation of the Systematic Switching Strategy "any one" of the below mentioned funds to be selected. Please select the fund of your choice :

Fund name	Yes
SFEF - SSS Kotak Frontline Equity Fund	<input type="checkbox"/>
SCOF - SSS Kotak Classic Opportunities Fund	<input type="checkbox"/>

2B. CHANGE IN ALLOCATION BETWEEN TARGET FUNDS.

Notes: 1. Changes will be accepted from next monthly anniversary.

2. Your funds will now move to target fund as per your below selection.

Fund Codes	Fund Description	From (%)	To (%)
SFEF	Kotak Frontline Equity Fund		
SCOF	Kotak Classic Opportunities Fund		
Total			100%

PART 3 - DE-ACTIVATION OF SYSTEMATIC SWITCHING STRATEGY WITH PREMIUM RE-DIRECTION

Notes:

- 1. Systematic Switching Strategy (SSS) can be stopped at any point of time by a written request and it shall take effect from the next policy month post receipt of the request
- 2. On stopping the SSS, the fund values in the respective funds will remain as it is or they can be switched into other applicable funds.

Part 3A

Deactivation of SSS facility Yes

Part 3B

If ans to question 3A. is yes then please provide your Future Premium Re-direction from any of the below funds

Fund Coded	Fund Description	Allocation%
FMMF	Kotak Money Market Fund	
FCOF	Kotak Classic Opportunities Fund	
FFEF	Kotak Front line Equity Fund	
KBDF	Kotak Dynamic Bond Fund	
FBLF	Kotak Balanced Fund	
Total		100%

PART 4 - DECLARATION BY THE POLICYHOLDER

I hereby declare that I understand and agree to all the conditions and information given above. I further agree and understand that Fund Switch consequent to my request for the same herein shall be governed by the provisions and terms and conditions of the policy contract referred to herein.

[Signature area]

Signature of the Policyholder / Assignee

Note: In case the policy is assigned, please ensure that this form is signed by the Assignee.

PART 5 - DECLARATION OF THE SCRIBE (APPLICABLE WHERE REQUEST IS ACCEPTED IN VERNACULAR LANGUAGE)

I, _____ (Full Name) have explained the fund details to the proposer/life assured and he/ she has accordingly opted for the above decision. I also confirm that the Fund Switch / Premium Redirection Form has been signed in my presence.

Address _____

Village / District _____ Land Mark _____

City _____ State _____ Pin _____

Place: _____ Date:

[Signature area]

Signature of Scribe

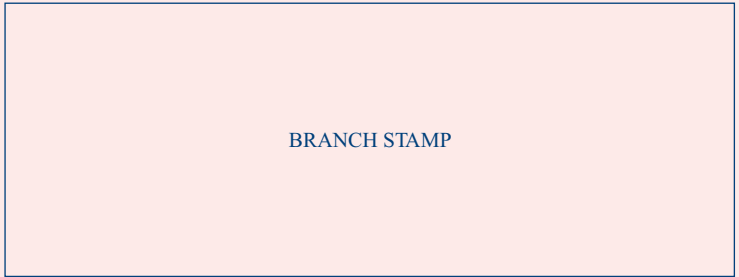
FOR BRANCH OFFICE USE ONLY

Note : Please fax Fund Switch / Future Premium Redirection form on 022-66200554. If faxed on any other number then we will not be responsible for delay in processing.

Mode of Receipt : _____

Request Call ID : _____

Name of BOE : _____



Kotak Mahindra Old Mutual Life Insurance Ltd.

Regn. No. 107, CIN: U66030MH2000PLC128503, **Regd. Office:** 4th Floor, Vinay Bhavya Complex, 159-A, C.S.T. Road, Kalina, Santacruz (E), Mumbai - 400 098

For any correspondence kindly contact us at: Kotak Infiniti, 7th Floor, Zone IV, Building No. 21, Infiniti Park, Off Western Express Highway, Goregaon Mulund Link Rd., General A.K. Vaidya Marg, Malad (E), Mumbai – 400 097.

(+9122) 6605 7777 {D} 66200550 {F} 1800 209 8800 (toll free)

<http://insurance.kotak.com/> • clientservicedesk@kotak.com

ACKNOWLEDGEMENT

We acknowledge the receipt of Funds Switch / Future Premium Redirection request for Policy No.: _____ Branch Name: _____

Name of Branch Co-ordinator : _____ Date : _____ Time : _____

Kotak Mahindra Old Mutual Life Insurance. Regn. No. 107, CIN: U66030MH2000PLC128503, **Regd. Office:** Kotak Mahindra Old Mutual Life Insurance Ltd., 4th Floor, Vinay Bhavya Complex, 159-A, C.S.T. Road, Kalina, Santacruz (E), Mumbai - 400 098. **For any correspondence kindly contact us at:** Kotak Infiniti, 7th Floor, Zone IV, Building No. 21, Infiniti Park, Off Western Express Highway, Goregaon Mulund Link Road, General A.K. Vaidya Marg, Malad (E), Mumbai – 400 097. 1800 209 8800 (toll free) (+9122) 6605 7777 {D} 66200550 {F} <http://insurance.kotak.com/> • clientservicedesk@kotak.com • Insurance is the subject matter of solicitation.