

Track your policy with ease. Log on to www.pnbmetlife.com, Generate our own user name/password by using your customer ID

Partial Withdrawal/ Full Withdrawal/ Surrender Request Form

Policy Number

Date (ddmmyyyy)

Name of the Policy Owner

Contact number (Mandatory): _____

Email ID: _____

(The Contact details mentioned above will be updated for future correspondence)

Is there a change in Address- Yes No

Current mailing address of the Policy Owner (Mandatory) In case of a change in address, please raise a request for address change with valid proof.

MANDATORY Requirements to be submitted by the Policy Holder- (requests received without the specified documents would be rejected):

- Original Policy Document/Certificate of insurance (for Met Loan Assure) (for submission in case of Surrender/ Full Withdrawal and OSV & photocopy in case of Partial Withdrawal)
- Self attested Identity Proof & Address Proof Copy, as part of KYC requirement- in case of auto vested policy, the KYC and bank details of the new Policy Owner would be required
- Bank Account Details along with original cancelled cheque / Self attested passbook copy / Self attested Bank statement authenticating Policy Owner account details for direct credit. In case if the cancelled cheque doesn't carry the policy owner's name and account number imprinted in it, passbook or bank statement bearing pre-printed account number and name to be attached along with request form.
- In case the request has been received from any one other than the customer, customer authorization letter and id proof of the person who submitted the request to be submitted
- No objection certificate/Clearance certificate from the bank to be submitted for Met Loan Assure.

I apply to, please tick (✓)

Partial withdrawal (in Rs.) _____ **from the Unit Account of my policy**
Or in case of %, as per the table below

Fund Option	%Withdrawal
Preserver	
Protector	
Moderator	
Balancer	
Accelerator	
Multiplier	
Virtue	

Surrender/Full Withdrawal of my policy by withdrawing all the units/ full cash value of my policy.

Note:

1. If the requested partial withdrawal value is greater than the maximum eligible partial withdrawal value, the maximum eligible value will be paid.
2. In the event that a partial withdrawal results in the surrender value (being the fund value less applicable surrender penalty) of the policy falling below the threshold limit#, policy will be terminated and applicable surrender value will be paid. (#Pls refer 'Auto Foreclosure clause' as mentioned in Product T&C)
3. Amount payable on Surrender/ Full Withdrawal of the units is as per policy terms & conditions. The Surrender/ Full Withdrawal of the units' results in termination of the contract and all rights/ title and interest under the policy shall stand extinguished.

