

HDFC Life Maturity Discharge Voucher

Policy No.: <Policy Number>

Plan: <Plan name>

UIN: <UIN>

Name of the <Policyholder/Assignee/Beneficiary/Appointee>: <Beneficiary name>/<Appointee name>/<Policyholder name>/<Assignee name>

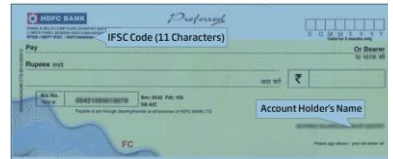
NEFT Details

Bank Account No.:

Account Holder Name:

Bank Name and Branch:

Account Type: ☐ Savings ☐ Current ☐ NRE ☐ NRO



☐ # All premium(s) paid from NRE Account ☐ ## Proportionate premium(s) paid from NRE Account

IFSC^: ^11 digit alphanumeric code appearing on your cheque leaf

E-Insurance Account Number:

Settlement Options for you:

The Policyholder can choose to exercise any one of the following options at least 30 days prior to maturity:

- ☐ **If you select "Yes":** This will allow you to receive the funds in periodic installments. During this period, you will not have any insurance cover; only the funds will remain invested with us and will be paid back to you on the selected frequency and term.
- ☐ **If you select "No":** The fund will be paid back to you upon the Maturity of your policy as one payout.

Do you wish to choose the settlement option under the policy? ☐ Yes ☐ No

Settlement Term (in years): ☐ One ☐ Two ☐ Three ☐ Four ☐ Five

Frequency of Payment: ☐ Yearly ☐ Half-yearly ☐ Quarterly ☐ Monthly

Verify/update your mobile number and Email ID at any of our touchpoints mentioned below to receive policy updates via SMS and email.

Electronic payment of claim/maturity/ other dues is mandatory. Submit NEFT documents at any HDFC Life branch or email us at service@hdfclife.com. Please ignore, if submitted.

Any unclaimed amount will be invested in "Money Market Instruments, Liquid Mutual Funds and/or fixed deposit of scheduled banks". Administration and Fund management charge up to a maximum of 0.20% per annum will be applicable on unclaimed fund.

www.hdfclife.com

1860-267-9999 | 022-68446530
(Local charges apply) (STD Charges apply)

Available Mon-Sat from 10 am to 7 pm
Do not prefix any country code e.g. +91 or 00.

service@hdfclife.com

nriservice@hdfclife.com
(For NRI customers only)

Chat Bot - Elle
(Available on HDFC Life website & My Account)

WhatsApp Bot - Etty (Available on official WhatsApp) +91 82918 90569
To receive important updates regarding your policy through WhatsApp, please give a missed call on **9222273574** from your registered mobile number.

HDFC Life Insurance Company Limited. IRDAI Registration No. 101. **Communication Address:** 11th Floor, Lodha Excelus, Apollo Mills Compound, N.M. Joshi Marg, Mahalaxmi, Mumbai - 400 011.
Regd. Office: 13th Floor, Lodha Excelus, Apollo Mills Compound, N.M. Joshi Marg, Mahalaxmi, Mumbai - 400 011. CIN: L65110MH2000PLC12B245.
MSCR0639316022355



Tax Declaration:

1. Are you a tax resident of any country other than India as per the Income-tax Act, 1961? ☐ Yes ☐ No

Note: If you are a non-resident in India as per the Income-tax Act, 1961, you are mandatorily required to submit Tax Residency Certificate (TRC) with Form 10F to avail treaty benefits, otherwise tax will be deducted at source at a higher rate from policy payouts. As per Section 195 of the Income-tax Act, 1961, tax will be deducted at source from any payout to a non-resident at the rate applicable therein and subject to the conditions specified therein. Tax laws are subject to change.

2. Does your total taxable income for the relevant financial year (April 1 to March 31) exceed INR 1 crore?
☐ Yes ☐ No

3. Self-attested documents submitted: ☐ TRC ☐ FORM 10F

Date: _____ Place: _____

Disclaimer:

- ❑ Please read your policy document for more details.
- ❑ Carry original and self-attested copies of your Identity and Address proof for all payouts to be processed.
- ❑ TDS is applicable on payouts as per TDS guidelines.
- ❑ This mandate, upon processing, will override any of the previously tagged NEFT Mandates for all policies, held by the client with HDFC Life.
- ❑ In case of NEFT failure or any further requirements pending, payout will be kept on hold till fresh Discharge Voucher is received. Intimation regarding the same will be sent to you.
- ❑ #Refund to NRE account (full or proportionate) will be subject to ratio of premium(s) paid through NRE account. Please submit a Bank Statement or Bank Confirmation letter as an evidence for premium(s) paid through NRE account.
- ❑ ## In case of proportionate payout, please provide two Discharge Vouchers i.e. for NRE account and non-NRE account.
- ❑ In case of assignment, the maturity benefit will be paid to the Assignee. Hence, the enclosed Discharge Voucher and NEFT details should be duly filled and executed by the Assignee. If otherwise, NOC from the Assignee should be produced.
- ❑ Automatic vesting of ownership form needs to be submitted if the Life Assured has become a major.
- ❑ In case of death of Payee, death certificate of the Payee would be required to process the maturity payout.

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Declaration

I/We undertake to refund any amount that is credited to my/our account either in excess or which is not due to me/us, at anytime, for any reason and to this effect, I/We confirm that the particulars given here are true, correct and complete in all aspects. I/We understand and agree that the submission of this form does not mean that the request will be processed. I/We understand that any payout under the policy shall be strictly in accordance with the policy terms and conditions. Also, any payment shall be subject to realisation of the last renewal premium payment. Further, I/We understand that HDFC Life Insurance Company Limited (HDFC Life/Company) shall not be held responsible for any non-receipt of payment on account of wrong/incorrect/incomplete information given by me/us in this form. If a transaction is delayed or has not come into effect at all, due to incomplete or incorrect information, I/We shall not hold HDFC Life responsible in any manner whatsoever.

(For assigned cases, signature of the Assignee is required)

Name: _____

Date: _____

Place: _____

SIGN HERE

Signature of Account Holder

Name: _____

Date: _____

Place: _____

SIGN HERE

Signature of Policyholder/Assignee

Declaration to be made by a third person where the Policyholder/Beneficiary/Appointee/Assignee has affixed his/her thumb impression or has signed in vernacular or has not filled the application:

_____ has affixed his/her thumb impression/has signed in vernacular/has not filled the application. I hereby declare that the content of this application form has been explained to _____ in _____ language and have truthfully recorded the answers provided to me. I further declare that _____ has signed/affixed his/her thumb impression in my presence.

Name: _____ Date: _____ Place: _____

Address: _____

SIGN HERE

Signature of third person

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