

Registered Office: 6th Floor, Tower 3, Wing 'B', Kohinoor City, Kirol Road, Kurla (W), Mumbai 400070

Fund Switch (It will be applicable to existing funds only & not on future allocations)			
Percentage	From (Name of the Fund)	To (Name of the Fund)	Percentage

Premium Redirection (It will be applicable to future allocations only & not on existing funds)	
Fund Name	New %
Equity Large Cap Fund (SFIN:ULIF00118/08/11EQLARGECAP147)	
Equity Top 250 Fund (SFIN:ULIF0027/07/11EQTOP250147)	
Bond Fund (SFIN:ULIF00317/08/11BONDFUND147)	
Money Market Fund (SFIN:ULIF00425/08/11MONEYMARKET147)	
PE Based Fund (SFIN:ULIF00526/08/11PEBASED147)	
Managed Fund (SFIN:ULIF00618/08/11MANAGED147)	
Equity Mid Cap Fund (SFIN:ULIF001107/10/16ETLMIDCAP147)	
Equity Blue Chip Fund (SFIN: ULIF01226/11/18ETLBLUCHIP147)	
GILT Fund (SFIN: ULIF01326/11/18ETLGILTFND147)	
Long Term Bond Fund (SFIN: ULIF01426/06/20ETLLNGTERM147)	
Total	100

- Availability of Investment Funds differ from product to product. Please refer product brochure/policy contract for details.
- Switching and premium redirection is not allowed under Systematic Transfer Plan (option available only with Wealth Ultima). However, the Policyholder may (opt in/opt out) of this option anytime during the Policy Term.
- If the Policy has been assigned, all policy servicing requests would be accepted only from the Assignee.
- Premiums for Unit Linked Products received up to 3:00 pm IST on a business day (Mon-Fri), the closing NAV of the same day will be applicable. However, if the application is received after 3:00 pm IST, then the closing NAV of the next business day shall be applicable.
- Free switches cannot be carried forward to the next policy year if not used.
- Switch amount is subject to the minimum switch amount as mentioned in the policy contract.
- Once opted for Switch option or Premium Redirection, the same cannot be reversed.
- Premium Redirection is applicable to the future base premiums as well as top-up premiums, but will not affect the existing units or fund value .
- Notice for premium redirection in writing to be given at least 2 weeks prior to the due date of the next premium.
- Switch/Redirection Charges (if any) beyond the number of free switches/redirection as mentioned in the policy contract, will be charged by debiting the same from the amount to be switched. This varies from product to product.
- If request for Fund Switch and Premium Redirection received in one service form, Fund switch will be processed first and then Premium Redirection.

I hereby declare that I have understood the above points & fees/charges applicable for switch & redirection as stated in Terms & Conditions in the Policy document.

<p><b>For Branch Office Use</b></p> <p>Service Request No. (Fund Switch): _____</p> <p>Service Request No. (Premium Redirection): _____</p> <p><small>Note: Two separate SR's to be raised for respective requests</small></p> <p>Branch Name: _____</p> <p>Staff Name: _____</p> <p>Staff Sign: _____</p> <p>Place: _____</p> <p><small>*KYC document to be collected as per Service Request</small></p>	<p><b>Date and Time Stamp</b></p> <div style="border: 1px solid black; height: 100px; width: 100%;"></div> <p style="text-align: center;"><b>Signature of the Policy Holder</b></p> <p>Date: <span style="border: 1px solid black; padding: 2px 5px;">D</span><span style="border: 1px solid black; padding: 2px 5px;">D</span> <span style="border: 1px solid black; padding: 2px 5px;">M</span><span style="border: 1px solid black; padding: 2px 5px;">M</span> <span style="border: 1px solid black; padding: 2px 5px;">Y</span><span style="border: 1px solid black; padding: 2px 5px;">Y</span><span style="border: 1px solid black; padding: 2px 5px;">Y</span><span style="border: 1px solid black; padding: 2px 5px;">Y</span></p> <p>Place: _____</p>
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Received a request for Fund Switch/Premium Redirection for policy no.: \_\_\_\_\_ on 

D	D
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M	M
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Y	Y	Y	Y
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 at \_\_\_\_\_ a.m/p.m.