



**Please Note:**

- Your request will be processed provided the request form has been filled in completely and all mandatory documents have been submitted;
- For Unit Linked products, if application is received up to 15:00 hrs IST on a business/working day, the same day's NAV will be applicable. However, if application is received after 15:00 hrs IST, then the next day declared NAV will be applicable;
- In case of address change or contact details change request, please fill up a separate policy service request form and submit with valid address proof;
- Axis Max Life Insurance shall not be held responsible for delay or non-receipt of the cheque in case the postal address is incomplete/incorrect in the company's records;
- Axis Max Life Insurance will not be responsible in case of non-credit to your account or if your transaction is delayed or not effected at all, for reasons of incomplete/incorrect information provided or rejected by your bank. In case the requisite information for direct credit is not received or transaction is rejected by the bank, the payouts will be made vide cheque.

**Mandatory Documents Required for Processing Payout**

- ☐ Self-attested copy of official valid document such as Aadhar, Voter ID, DL or Passport or NAREGA Job Card (Carry Original for Branch Verification as well);
- ☐ Original cancelled cheque with pre-printed name & account number;
- ☐ Pass book copy/bank statement having pre-printed name & account number in case cancelled cheque does not have pre-printed name and account number (carry original for verification at branch);
- ☐ Latest contact details & NRE bank statement reflecting all premiums paid from NRE account.

**Branch Mandatory Checklist**

☐ All documents are original seen and verified by the Axis Max Life Insurance personnel.

☐ Retention efforts made      Yes ☐      No ☐

☐ Reason for surrender

1) Stated policy benefits and returns, as per the policy contract, vary from those understood by me at the time of purchase

☐ I thought that I need to pay premiums for lesser years/only 1 year

☐ I thought I will get higher returns

☐ The maturity period is different from what I understood

☐ Other reasons: \_\_\_\_\_

2) I cannot afford to pay the premium for this policy

☐ I have a medical emergency      ☐ I have a financial emergency

☐ I am getting better benefits from another insurer

☐ I am getting good returns based on my fund value and I want to withdraw the money

☐ I want to withdraw my funds as the lock-in period is over

☐ Payout to the customer      NEFT ☐      Cheque ☐

Did you know? Buying a new insurance is more expensive than insurance purchased at a younger age. Don't surrender! You can also opt for partial surrender or loan facility, to meet your fund requirements and continue with your policy, subject to the terms and conditions of the policy.



**Low Charges:** In the Unit Linked products (ULIPs), the charges reduce gradually over the years leading to a higher proportion of your premium being invested in the fund.



**High Growth Potential:** ULIPs provide the option to invest in equity, which provides potential for higher growth of your funds.



**Life Cover:** Once the policy is surrendered, the life cover ceases thus depriving you of the benefit when you actually need it.



**Tax Benefit:** You can avail tax benefit under the section of the Income Tax Act 1961, subject to any further amendment.

**To be Filled only if Nationality is Other than Indian**

### Important Instructions:

- All fields are compulsory • Please fill in capital letters  
• Attach documentary evidence as marked (\*)

[illegible][illegible]

Father's/Husband's Name:

Nationality: Indian ☐ Foreign National ☐ NRI ☐ PIO ☐

Citizenship: Indian ☐ Others, please specify ☐

Gender: Male ☐ Female ☐ Others ☐

Date of birth: DDMMYYYY City of birth: \_\_\_\_\_

Country of birth: \_\_\_\_\_

**\*INDIAN ADDRESS:**

Flat No./Building No.: \_\_\_\_\_

City: \_\_\_\_\_ State: \_\_\_\_\_ PIN Code:

[illegible]

Address Type: Residential ☐ Business ☐ Registered Office ☐ Unspecified ☐

**\*OVERSEAS ADDRESS:**

Flat No./Building No.: \_\_\_\_\_

City: \_\_\_\_\_ State: \_\_\_\_\_ PIN Code:

[illegible]

Address Type: Residential ☐ Business ☐ Registered Office ☐ Unspecified ☐

----->

Policyholder's Name: \_\_\_\_\_

Request Received Date: 

D	D	M	M	Y	Y	Y	Y
---	---	---	---	---	---	---	---

 Request No.: \_\_\_\_\_

Name of Branch Official: \_\_\_\_\_

Employee Code of Branch Official: \_\_\_\_\_

Signature: \_\_\_\_\_

GO Stamp

OCCUPATION:

Salaried ☐ Self-employed ☐ Business ☐ Retired ☐ Housewife ☐

Others, please specify: ☐ \_\_\_\_\_

Passport No.:

Passport Issuing Country: \_\_\_\_\_

\*PAN.:

\*Foreign Tax Identification No. (or Functional Equivalent): \_\_\_\_\_

Country: \_\_\_\_\_

\*Country of Residence as per tax laws: \_\_\_\_\_

(If more than one country of tax residence, provide Tax Identification No./Functional Equivalent: on all countries of tax residence)

ID Proof submitted:

Election ID ☐ Valid Driving License ☐ Valid Passport ☐ Aadhaar Card ☐

NAREGA Job Card ☐ Any Other Government Agency Issued Document ☐

I do hereby certify that above stated information is correct in all respects and may be used for all purposes, including reporting to statutory authorities & compliances, and understand that it is my responsibility to report the changes, if any, to Axis Max Life Insurance within 2 weeks of occurrence of such change.

Policyholder's Signature: \_\_\_\_\_

For Office Use Only

Request Received Date:

Branch Name and Code: \_\_\_\_\_

Employee Code: \_\_\_\_\_

Signature: \_\_\_\_\_

Certified that this form  
is complete in all respects  
and all relevant documents  
are obtained and verified.



**Our virtual assistant**  
Chat with MILI  
on our website



**WhatsApp**  
Send 'Hi' to  
+91 74283 96005



**Login to manage your policy**  
[axismaxlife.com/customer-service](https://axismaxlife.com/customer-service)



Call us at 1860 120 5577

For more details, visit us: [axismaxlife.com/contact-us](https://axismaxlife.com/contact-us)



Axis Max Life Insurance Limited (formerly known as Max Life Insurance Company Limited) is a Joint Venture between Max Financial Services Limited and Axis Bank Limited. Important: DO NOT believe in calls, SMSes or e-mails offering discounts. For NEFT Payments, please transfer only to "HSBC Bank A/C No. 1165 <Followed by 9 digit Policy No> IFS Code: HSBC0110002". Axis Max Life Insurance does not collect Premium in any other account. **Axis Max Life Insurance Limited (formerly known as Max Life Insurance Company Limited):** Plot No. 90 C, Sector 18, Udyog Vihar, Gurugram, Haryana - 122 015. **Regd. Office:** 419, Bhai Mohan Singh Nagar, Railmajra, Tehsil Balachaur, District Nawanshahr, Punjab - 144 533. **CIN:** U74899PB2000PLC045626 | Customer Helpline Number: 1860 120 5577

The Brand Ambassadors (if depicted herein), have endorsed only the Axis Max Life Insurance Products and are not in any manner endorsing Axis Bank Limited and do not have any kind of association or relationship with Axis Bank Limited.

IRDAI Registration No. 104

**BEWARE OF SPURIOUS/FRAUD PHONE CALLS!**

- IRDAI is not involved in activities like selling insurance policies, announcing bonus or investment of premiums
- Public receiving such phone calls are requested to lodge a police complaint