

# MATURITY CLAIM FORM

## PERSONAL DETAILS

Policy Owner Name	
PAN of Policy Owner	
Residence for Tax Purpose in Jurisdiction Outside India	<input type="checkbox"/> No <input type="checkbox"/> Yes, If Yes then please fill the attached FATCA form and CRS- Self Certification form
Photo Identify Proof Type and No.	<input type="checkbox"/> PAN <input type="checkbox"/> Passport <input type="checkbox"/> Driving License <input type="checkbox"/> Other
Address Details	

## NEFT DETAILS

a) Bank Account Number:	
b) Account Holder name:	
c) Bank Name:	
d) IFSC Code:	
e) Branch	
f) Account Type :	<input type="checkbox"/> Saving <input type="checkbox"/> Current <input type="checkbox"/> NRO <input type="checkbox"/> NRE

Provide personalized cancelled cheque OR Non Personalized cheque along with the bank statement/bank passbook

## MATURITY CLAIM COMMUTATION CONSENT

We request you to please provide your consent for the commutation option by filling up the below details:

### Mandatory Information to be filled:

Percentage of Maturity amount you wish to commute (Receive as lump sum payment): \_\_\_\_\_ % (Maximum 33% is allowed. Also please specify details of insurance company from whom you wish to purchase annuity:

Tata AIA Life Plan Name: \_\_\_\_\_

Tata AIA Life Application No.           (Please submit the required application form along with relevant documents at our branch.)

OR

Name of the Insurance Company (If not opted Tata AIA Life): \_\_\_\_\_

Signature of Policy Holder/Claimant

(I understand and agree to the disclaimer mentioned below in the form)

(If at the times of policy inception insured was less than 18 years, insured signatures should be verified by original policy holder)

### \*Disclaimer:

• Indicative Maturity amount is arrived at basis assumption that policy is in force on Maturity Date and all due premiums have been paid. • If at the time of making the maturity claim payment, any premium remains outstanding, the same will be recovered from the amount shown herein as payable under the Policy. Additionally, APL interest, Policy Loan, Tax and any other outstanding charges as applicable will be recovered from the amount payable on Maturity. • The Net Amount Payable mentioned above does not include any excess amount received by the Company and which will be refunded to the Policyholder along with the Maturity claim amount. • The Net Amount Payable may change if Terminal Bonus or Reversionary Bonus where the policy is eligible for it, is declared by the Company after the dispatch of this communication to the Policyholder. • Interest on loan has been calculated on the assumption that the loan or any part of it and /or interest on the same remains outstanding as on the Maturity Date of the Policy. • In case Policy Maturity Date falls on non-working day or Holiday, NEFT payout will be credited on the next working day. • In case of address change please provide the Request for change form along with the address proof. All Premiums, Charges, and interest payable under the policy are exclusive of applicable taxes, duties, surcharge, cesses or levies which will be entirely borne/ paid by the Policyholder, in addition to the payment of such Premium, charges or interest. Tata AIA Life shall have the right to claim, deduct, adjust and recover the amount of any applicable tax or imposition, levied by any statutory or administrative body, from the benefits payable under the Policy. • Income Tax benefits u/s 80C and 10 (10D) would be available as per the prevailing income tax laws, subject to fulfillment of conditions stipulated therein. Tata AIA Life Insurance Co. Ltd. does not assume responsibility on tax implication mentioned anywhere in this document. Income Tax laws are subject to change from time to time. Please consult your own tax consultant to know the tax benefits available to you. • In case the insured is a juvenile who is turning major, please submit the discharge voucher with supporting as mentioned above duly signed by the juvenile, upon turning 18years and not before that. • Please note Rider premium & service tax is not considered for Return of Premium calculation