pnb MetLife

Milkar life aage badhaein

PNB MetLife India Insurance Company Limited

Registered office: Unit No. 701, 702 & 703, 7th Floor, West Wing, Raheja Towers, 26/27 M G Road,
Bangalore -560001, Karnataka. IRDA of India Registration number 117.
CI No. U66010KA2001PLC028883, call us Toll-free at 1-800-425-6969, Website: www.pnbmetlife.com,
Email: indiaservice@pnbmetlife.co.in
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Mumbai – 400062. Phone: +91-22-41790000, Fax: +91-22-41790203

		Financial Payout Request – Policy Loan				
Definition: Policy Loan Request is an option available in certain products where customer can take a loan from his policy basis the surrender value or fund value.						
Sno.	**Documents**	**Submission of Service Request by Policy Owner in PNB MetLife or Bank (PNB/JKB & KBL) or CAMS Branches**	**Submission of Service Request by Policy Owner through Courier**	**Submission of Service Request by Third Party in PNB MetLife or Bank (PNB/JKB & KBL) or CAMS Branches**	**Customer Portal**	**E-mail from registered email ID**
1	Policy Servicing Request form duly filled and signed by the Policy Owner	Yes	Yes	Yes	No Such Option	No Such Option
2	Original Policy Document (PD): **Note**: Indemnity bond / Duplicate PD can be submitted in case original PD is not received/destroyed/lost etc.	Yes	Yes	Yes		
3	Self-attested ID proof of Policy Owner **Note** : Customer should carry the original documents in case of physical submission	Yes	Yes	Yes		
4	Cancelled cheque leaf / Copy of self-attested bank passbook / Copy of Self-attested bank statement - containing the Account holder's name, A/c No. & IFSC code	Yes	Yes	Yes		
5	**If request submitted by Third Party with Original Policy Document, following additional document of PO is required:** 1. Copy of latest Bank Statement having account number same as provided at the time of Proposal Login **OR** 2. Copy of Bank Statement reflecting premium paid to PNB MetLife **OR** 3. Original ID proof same as provided at the time of Proposal Login of the policy owner **OR** 4. Self-Attested ID proof like Passport/ Aadhaar Card/ Driving License along with original of the same	No	No	Yes		
6	**If request submitted by Third Party with Indemnity bond / Duplicate PD, following document of PO will be provided:** 1. Copy of latest Bank Statement having account number same as provided at the time of Proposal Login **OR** 2. Copy of Bank Statement reflecting premium paid to PNB MetLife **OR** 3. Original ID proof same as provided at the time of Proposal Login of the policy owner	No	No	Yes		

7	Assignment Form - Policy has to be assigned for all Traditional loan cases. For ULIP assignment form is not required	Yes	Yes	Yes		
8	Self-Attested Address Proof of PO **Note** : Mandatory only in case of Indemnity/DPD requests or where there is an address change	Yes	Yes	Yes		
9	Policy Owner Authorization Letter and ID proof of the person submitting the request on behalf of Policy Owner	No	No	Yes		

Note:

- Interest Rate Revision for Policy loan/ APL (With Effect from 15th April, 2014 is 10.50% PA)
- For Existing policy loans and APL's availed from 5th Nov 2011 to 14th April 2014,the rate of interest applicable would be 12% PA
- For Existing policy Loans and APL's, availed prior to 5th Nov 2011, the rate of interested applicable would be10.25% PA

You may visit our Website (https://www.pnbmetlife.com) for information on below points:

- **Policy Loan Request Form Version 3.5 for submission of the above mentioned service request**

Go to Download Forms >> Service Forms >> Select Regional Language – **Policy Loan Request Form Version 3.5**

- **Customer Authorization Letter – Policy Owner Servicing Request Version 1.0 if request is being submitted through Third-Party**

Go to Download Forms >> Service Forms >> Select Regional Language – **Customer Authorization Letter – Policy Owner Servicing Request Version 1.0**

- **List of Operational CAMS Branches**

Go to Customer Service >> Get In Touch >> Service Options – CAMS>> **CAMS Branches**

- **List of Operational PNB MetLife Branches**

Go to Contact Us >> Select the nearest Branch >> **Enter State, City, Area as per your preference**