

## Fund Switch, Top Up and Other Financial Form

## Important Information

- PNB MetLife (PMLI) can call for additional documentation if required
- At the me of request submission original ID Proof of the Policyholder to be mandatorily presented and all supporting proof/s & document/s submitted along with the request should be self-attested by the Policyholder
- For third party submissions (anyone other than Policyholder), authorization letter from the Policyholder in PMLI format, Self-attested ID proof of the person submitting the request is required
- Please submit a self-attested PAN Card copy for updation of PAN No. Form 60 needs to be in PNB MetLife format if submitted in lieu of PAN Card
- In case of Auto-Vesting, the request to be signed by the new Policyholder. Signed valid ID proof (like Driving License,
- Passport, PAN Card, etc.) of the new Policyholder should be taken for updation in records
- If application for Unit Linked Investment Product (ULIP) is received up to 15:00 hrs IST on a business/ working day, the same day's unit value will be applicable while processing the request. However, if the application is received after 15:00 hrs, then the next declared Net Asset Value (NAV) will be applicable

	(		
y Number 1:	*Policy Number 2:		Date: D D M M Y
ne of the Policyholder:			
ntact Number:		Email ID:	
N No./ Form 60 :		**Aadbaar Card No: XX	X X X X X X
there a Change in Address: Yes No	If yes, please submit separate rec	uest for address change along with va	lid proof
fields are mandatory			
ly last 4 digits of Aadhaar No. to be mentioned.			
und Switch/Premium Redirection			
na Switch/Premium RealPection			
Name of Fund (depends upon	Fund Switch From	Fund Switch To	Premium Redirection
availability of funds in Plan)	(In Units/ Percentage/ Amount)	(In Units/ Percentage/ Amount)	(In Units/ Percentage/ Amount)
Preserver II			
Preserver II Preserver			
Preserver			
Preserver Protector II			
Preserver Protector II Protector			
Preserver Protector II Protector Balancer II			
Preserver Protector II Protector Balancer II Balancer			
Preserver Protector II Protector Balancer II Balancer Multiplier II			
Preserver Protector II Protector Balancer II Balancer Multiplier II Multiplier			
Preserver Protector II Protector Balancer II Balancer Multiplier II Multiplier Virtue II			
Preserver Protector II Protector Balancer II Balancer Multiplier II Multiplier Virtue II Virtue			
Preserver Protector II Protector Balancer II Balancer Multiplier II Virtue II Virtue Moderator			
Preserver Protector II Protector Balancer II Balancer Multiplier II Virtue II Virtue Moderator Accelerator			

would be rejected. The premium redirection proportion should be at least 20% of the premium. The request should be received at least one month prior to the renewal premium due date and would be applicable for all future premiums.

\_\_\_\_\_

Cheque/ DD Number \_\_\_\_

Allocation of Top Up Premium I wish to pay an amount of Rs

Draft/ Credit Card in the favor of PNB MetLife India Insurance Co. Ltd.

Bank Name

\_\_\_\_\_ towards Top up premium with respect to the above Policy by Cash/ Demand

Cheque/ DD Date \_\_\_\_

In case of Self-Managed Option (Choose the below Allocation Proportion):

Fund Options	Allocation %	Fund Options	Allocation %
Accelerator		Preserver	
Balancer		PreserverII	
BalancerII		Protector	
Flexicap		ProtectorII	
Moderator		Virtue	
Multiplier		Virtue II	
MultiplierII			
Total			

## **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 or write to us at 1st Floor, Techniplex -1, Techniplex Complex, Off Veer Savarkar Flyover, Goregaon (West), Mumbai– 400062. Phone: +91- 22-41790000, Fax: +91-22-41790203

<u>Note:</u> • Minimum amount eligible for Top Up is Rs. 5000/ Top Up is eligible only for active ULIP policies. Minimum allocation in any fund should be 20%. Top up credit to the policy may increase its base Sum Assured as per terms and conditions of the product. It is advised that cash payments be made only at PMLI branches and other authorized cash collection agencies against a valid discharge/ receipt. For cash deposits >=50000/-, copy of PAN card to be submitted. For Top up Premium > = Rs. 99999/-, income proof to the satisfaction of PMLI need to be provided.								
Credit Card should be in the name of the Policyholder Only								
In case of Auto Rebalancing Option	n (Choose the Allocation	Proportion %):						
	Flexi Cap		Protector II		Total * (in %)			
Please note - Minimum Allocation in any fund has to be 20% and *Total should always add up to 100%								
Choose the rebalancing Trigger event (as % of Fund Value): 10% 15% 20% 25%								
Systematic Transfer On		— — — — — — — — – – – – – – – – – – – –						
Systematic Transfer Option (STO):       (only with Met Smart Platinum)       Opt In*       Opt Out         For Opt In option, Premiums in Protector II fund (Debt Oriented Fund) is automatically transferred to the Flexi Cap fund (Equity Oriented Fund) systematically, every month "Free of Cost".         *Minimum allocation in Protector II should be 50% for choosing Systematic Transfer Option. In case, the current premium allocation and Fund Value (FV) is less than 50% in Protector II, please raise a request for Fund Switch for existing funds and premium redirection for future premiums so as to ensure minimum FV in Protector II is 50% and Premium allocation in Protector II is 50% of the future renewal premium. Please fill in the Fund Switch & Premium Redirection boxes as above.         Note:       Switch between all other funds will be allowed except Flexi Cap and Protector II. STP will get triggered on next policy anniversary. In case Premium Payment Mode is changed from Annual to any other mode, STO will be deactivated automatically. In case of Partial Withdrawal request while STO is active, the withdrawn amount will reduce the Fund Value of other Funds except Flexi Cap and Protector II Fund proportionately.								
Portfolio Balancing:		I. AL	ITO REBAL	ANCING REL	ΔΤΕΠ			
<b>Opt In Option:</b> In case you wis	sh to ont in for Auto Reha					trigger event helov	N) •	
	Flexi Cap		Protector II		Total * (in %)			
Please note- Minimum Allocation in	any fund has to be 20% a	nd *Total should al	ways add up to	100%				
Choose the rebalancing Trigger ever	nt (as % of Fund Value):	10% 15%	20%	25%				
Opt Out Option: In case you v	wish to opt out of Auto Re	balancing Option, c	choose any one o	of the following:				
<ul> <li>Do you wish to keep existing fu</li> <li>Do you wish to change the exist</li> </ul>				dicated below				
• Do you wish to change the exist	Name of Fund (depend							
	availability of funds in Preserver II	•	Fund Switch	% (New %)	Premium Redir	rection (New %)		
	Protector II							
	Balancer II Multiplier II							
	Virtue II							
	Flexi Cap							
	Total							
Modification: In case you wish to modify the existing Allocation Proportion and trigger events for rebalancing, please indicate below:								
	Flexi Cap		Protector II		Total * (in %)			
<u>Please note</u> - Minimum Allocation in	any fund has to be 20% a	nd *Total should al	ways add up to	100%		_1		
Please note- Minimum Allocation in any fund has to be 20% and *Total should always add up to 100% Choose the rebalancing Trigger event (as % of Fund Value): 10% 15% 20% 25%								
II. STOP LOSS RELATED								
Opt In Option: In case you wish to opt in for Stop Loss Option, choose the trigger event below:								
Choose the Trigger event (% of Net Asset Value (NAV) of Flexi Cap Fund):								
If current fund value and allocation is less than 50% in Flexi Cap Fund, please fill the following details:								
Fund Switch From (Minimum								
	Fund Opt	ons	Allocation in	any fund has to l	be 20%)	und Switch To		
	Preserver II Protector II						———————————————————————————————————————	
	Balancer II							
	Multiplier II							
	Virtue II Flexi Cap						—	
	Total							
							Version 2.1/Jan'20	

	Г	Fund Option	15	9	6 Allocation			
	-	Preserver II						
		Protector II						
	F	Balancer II Multiplier II						
	F	Multiplier II Virtue II				————		
	F	Flexi Cap						
		Total						
l <u>ease Note:</u> If the Fund Value % a If current fund value and alloc ] <u>Opt Out Option</u> : Do you wis	cation is more that	n 50% in Flexi Cap fund and	you wish to make	e changes to the sa	me, please fill the		nd Switch and Premiu	ım Redirection
Do you wish to keep existing	fund value and al	location proportion (%)?	Yes No					
Do you wish to change the ex	kisting fund value	and allocation proportion (9	%)? 🗌 Yes, as i	indicated below				
	Name of Fund	d (depends upon		a. (a. a.)				
		f funds in Plan)	Fund Switch	% (New %)	Premium Redi	rection (New %)		
	Preserver II							
	Protector II							
	Balancer II Multiplier II				<u> </u>		———————————————————————————————————————	
	Virtue II						———————————————————————————————————————	
	Flexi Cap							
	Total							
noose the Trigger event (% of Ne	holder:	V) of Flexi Cap Fund):	10% _ 15%	20% 25%	6			
		e policy terms and condition		e applicable to this	request an d I sha	all be solely respon	sible for all the conse	quences arisir
nis request including on account of	of any incorrect o	r incomplete details contain	ned herein.					
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Version 2.1/Jan'20

For Branch Use Only: To be filled by Branch Services - Mandatory							
Request received from: Customer Customer Representative Bank Courier							
Form Received By: Employee Name:	Employee ID:	_ Employee Signature:					
Request Received date at Branch: DD-MM-YYYY	Request received Time at Branch: HH:MM		Branch Stamp				

Version 2.1/Jan'20