

ASSIGNMENT FORM

POLICY NO.

I/We _____ Policyholder's name _____, do hereby assign all my/our rights, equities, and benefits in the life insurance policy issued by Max Life Insurance Co. Ltd and bearing number _____, in favor of _____ assignee's name _____. Going forward, the premium for the policy shall be paid by _____. The reason for assignment is _____ Assignor's relationship with Assignee (in case of individual assignment) _____

Is Assignee/Policy Owner/Payee a Politically Exposed Person*? Yes / No (Please tick).

*Politically Exposed Persons (PEP) are individuals who are or have been entrusted with prominent public functions, for example Heads/ Ministers of Central /State government, Senior politicians, Senior government/ judicial / military officers, Senior executive of state owned corporations, Important political party officials & immediate family member of above persons (Spouse, Children, Parents, Siblings, In-laws).

Note: Copy of self attested ID proof is mandatory in all the assignment requests. However if annual premium is Rs. 1 lac and above and to be paid by assignee then the copy of self attested address proof and income document will also be required.

Assignor's signature _____ (Company stamp and signature of authorized signatory if policyholder is a company)

Date: _____ Place: _____

Accepted:

Assignee's signature _____ (Company stamp and signature of authorized signatory if Assignee is a company)

Assignee's name _____
 Assignee's address _____
 Assignee's telephone number _____
 Contact details of assignee (if assignee is a company)
 Name of contact person _____
 Address of contact person _____
 Tel No. of Contact Person _____

Witness (1)

Name: _____
 Add: _____
 Signature: _____
 Date: _____
 Place: _____

Witness (2)

Name: _____
 Add: _____
 Signature: _____
 Date: _____
 Place: _____

##Acceptable income proofs:

- Latest Year ITR
- Latest Year Form 16
- Bank statement showing salary credit of last 3 months
- Balance Sheet and Profit and Loss Account
- Audited annual accounts of the Proposer/ Payor
- Rental Agreement
- Agriculture Sales Receipts
- Proof of proceeds of lump-sum amount received from which premium is paid. For Example, sale Deed if premium is paid from the sale of property, proof of lump-sum amount received at the time of retirement, proof of maturity of fixed deposits, mutual fund redemption, proof of other insurance policies maturity amount received etc.

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