Reliance	NIPPON LIFE INSURANCE
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# PROPOSAL FORM FOR RELIANCE NIPPON LIFE

## RELIANCE NIPPON LIFE GROUP UNIT LINKED EMPLOYEE BENEFITS PLAN

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Please feel free to use additional pages for additional information. Please make sure that all the signatories signing the proposal form have also signed the additional page(s) with company seal.

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Others (Please specify)																							
Society / Establishment Maintainance Bill Leave and Licence Agreement Certificate of Enrollment Trust Deed  Others (Please specify)  MASTER POLICYHOLDER PAN CARD NUMBER  Card No. DETAILS OF THE AUTHORISED SIGNATORIES (Please provide minimum two authorised signatories)  Buthorise Reliance Nippon Life Insurance Company Limited to accept the following persons as 'authorised signatories' on behalf of the trustees/Company for the wing purposes:  min new members into the scheme and provide membership details as required by Reliance Nippon Life Insurance Company Limited.  give Reliance Nippon Life Insurance Company Limited notice of members who cease employment and authority to pay benefits for these members in the event at a benefit is possible in accordance with the trust deed and rules/board resolution, and ovide any other information deemed necessary by Reliance Nippon Life Insurance Company Limited to assist in maintaining accurate member records and to include benefits.  Indicate benefits and the Authorised Signatory 1*: Name  gnation																							
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8. INVESTMENT CHOICE DETAILS																							
The contributions are to be invested as per the p	oroportions r	nentior	ned ag	ainst th	ne fur	nds:																	
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Group Money Market Fund 2							%										I	I	%				
Group Corporate Bond Fund 3							%										T		%				

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Group Equity Fund 4

Group Balanced Fund 4

Group Large Cap Equity Fund

9. CONTRIBUTION FREQUENCY														
Yearly Half Yearly Quarterly Monthly														
10. PLEASE INDICATE THE AMOUNT OF INITIAL CONTRIBUTION														
₹ Aggregation Option (Applicable in case you have multiple policies under this product. Please provide the necessary doc	cumentation to avail this option)													
11. POLICY COMMENCEMENT DATE														
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12. PAYMENT DETAILS														
Details of contribution paid Cheque / DD Cash RTGS Amount in ₹														
Cheque / DD No.: Cheque / DD Date D D M M Y Y Y Y														
Bank Name														
Entity's country of tax residence in Jurisdiction(s) outside India. Yes No  Important: Please mandatorily fill FATCA/CRS declaration also as an Annexure to Proposal Form														
Inportant: Please managing his PATCA/CKS declaration also as an Almexore to Proposal Form  If the payment is from a third party, following AML/KYC documents will be required.														
Income Proof: (Any one of these Income proofs can be submitted)  1) Recent Income Tax Assessment Orders or Income Tax Returns of the trust.  2) Current year's Audited P & L account and Balance sheet of the trust.  3) Audited accounts of the trust (for the last fiscal).														
KYC Documents:  1) Address proof: (Any one of these Address proofs can be submitted)  a) Certificate of Registration issued by the Registrar of trust/Registered trust deed  b) Copy of Form 18  c) Electricity Bill (last 6 months)  d) Telephone (Landline) Bill (last 6 months)														
2) ID proof: (Any one of these ID proofs can be submitted) a) PAN Card of the trust b) Certificate of Registration issued by the Registrar of trust														
3) FATCA/CRS declaration Form														
Please note: In case the payment is forwarded by a company on behalf of it's Gratuity Trust, AML/KYC document's requirement	nt will be applicable for the company.													
13. LIST OF MANDATORY DOCUMENTS REQUIRED TO BE SUBMITTED ALONG WITH THE PROPOSAL FORM														
Duly filled in application form with signatures of minimum two trustees with trust seal (Gratuity)/two authorised signatorie	es with company seal (Leave Encashmen													

At work certificate signed by 2 authorised signatories with trust seal/company seal
Self attested copy of PAN Card*
Self attested copy of address proof as per section number 4 of this proposal form*
Self attested copy of Trust deed and rules* (for Gratuity Schemes)/Board Resolution*(for Leave Encashment Schemes)
Self attested copy of Deed of variation(s) (if any)*
Member data
No claim certificate on trust letter head in Reliance Nippon Life Insurance Company Limited prescribed format if the policy is to be commenced from the date prior to premium / contribution deposit date (Applicable for Gratuity Scheme)
Documents related to payment instrument
Valuation (summary & member data) certified with signatures of 2 trustees signing the application form with trust seal (Gratuity) two authorised signatories signing the application form with company seal (Leave Encashment)
Actuarial auditation copy signed as received and accepted with trust seal/Company seal by authorised signatories

\*Self attestation by signatures of the trustees signing the application form with trust seal/company seal
The documents ticked above shall be submitted to Reliance Nippon Life Insurance Company Limited representative in original.

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I certify that the client has understood the proposal form completely and the facts disclosed therein are true and correct to the best of my knowledge and belief, I have also verified the completeness of documentation. I further declare that to the best of my knowledge the premium amounts are not sourced from the proceeds of any criminal activities/offences listed in the Prevention of Money Laundering Act 2002 or under any other applicable laws. Should there be any adverse change in my opinion of the integrity or reputation of the applicant, I shall inform Reliance Nippon Life Insurance Company Limited immediately.

Signature of Insurance Advisor/SP/AP

SP/AP/Advisor Code

Date Place Signature of Sales Personnel

CA Exec/SM Code

Date Place

Authorised Person

Name

Date

Place

Designation

Authorised Signatory

Name SAP Code Date Place

**Authorised Signatory** 

Name Designation Date Place

### Section 41 of Insurance Act, 1938, as amended from time to time

No person shall allow or offer to allow, either directly or indirectly, as an inducement to any person to take out or renew or continue an insurance in respect of any kind of risk relating to lives or property in India, any rebate of the whole or part of the commission payable or any rebate of the premium shown on the policy, nor shall any person taking out or renewing or continuing a policy accept any rebate, except such rebate as may be allowed in accordance with the published prospectuses or tables of the insurer. Please refer to our website or contact our office for the details under the above mentioned Section 41.

## POLICY NOT TO BE CALLED IN QUESTION AFTER THREE YEARS (SECTION 45 OF THE INSURANCE ACT, 1938, AS AMENDED FROM TIME TO TIME)

(1) No policy of life insurance shall be called in question on any ground whatsoever after the expiry of three years from the date of the policy, i.e., from the date of issuance of the policy or the date of commencement of risk or the date of revival of the policy or the date of the rider to the policy, whichever is later. (2) A policy of life insurance may be called in question at any time within three years from the date of issuance of the policy or the date of commencement of risk or the date of revival of the policy or the date of the rider to the policy, whichever is later, on the ground of fraud: Provided that the insurer shall have to communicate in writing to the insured or the legal representatives or nominees or assignees of the insured the grounds and materials on which such decision is based. (3) notwithstanding anything contained in sub-section(2), no insurer shall repudiate a life insurance policy on the ground of fraud if the insured can prove that the mis-statement of or suppression of material fact was true to the best of his knowledge and belief or that there was no deliberate intention to suppress the fact or that such mis-statement of or suppression of a material fact are within the knowledge of the insurer: - Provided that in case of fraud, the onus of disproving lies upon the beneficiaries, in case the policyholder is not alive. (4) A policy of the life insurance may be called in question at any time within three years from the date of issuance of the policy or the date of commencement of risk or the date of the revival of the policy or the date of the rider to the policy, whichever is later, on the ground that any statement of or suppression of the fact material to the expectancy of the life of the insured was incorrectly made in the proposal or other document on the basis of which the policy was issued or revived or rider issued: Provided that the insurer shall have to communicate in writing to the insured the grounds and materials on which such decision to repudiate the policy of life insurance is based: Provided further that in case of repudiation of the policy on the ground of misstatement or suppression of material fact, and not on the ground of fraud, the premiums collected on the policy till the date of repudiation shall be paid to the insured or legal representatives or nominees or assignees of the insured within a period of ninety days from the date of such repudiation. Mis-statement of or suppression of shall not be considered material unless it has a direct bearing on the risk undertaken by the insurer, the onus is on the insurer to show that had the insurer been aware of the said fact no life insurance policy would have been issued to the insured. (5) Nothing in this section shall prevent the insurer from calling for proof of age at any time if is entitled to do so, and no policy shall be deemed to be called in question merely because the term of the policy are adjusted on subsequent proof that the age of the life insured was incorrectly stated in the proposal. Please refer to our website or contact our office for the details under the above mentioned Section 45.

Registered & Corporate Office: Unit Nos. 401B, 402, 403 & 404, 4th Floor, Inspire-BKC, G Block, BKC Main Road, Bandra Kurla Complex, Bandra East, Mumbai-400051 For more information or any grievance, 1. Call us between 8am to 8pm, Monday to Saturday on our Toll Free Number 1800 102 1010or 2. Visit us at www.reliancenipponlife.com or 3. Email us at: mlife.customerservice@relianceada.com. 4. Chat with us on our WhatsApp number (+91) 7208852700. Trade logo displayed above belongs to Anil Dhirubhai Ambani Ventures Private Limited & Nippon Life Insurance Company and used by Reliance Nippon Life Insurance Company Limited under license.

BEWARE OF SPURIOUS PHONE CALLS AND FICTITIOUS/FRAUDULENT OFFERS: IRDAI clarifies to public that: 1. IRDAI or its officials do not involve in activities like sale of any kind of Section 1. IRDAI or its officials do not involve in activities like sale of any kind of Section 2. In IRDAI or its officials do not involve in activities like sale of any kind of Section 2. In IRDAI or its officials do not involve in activities like sale of any kind of Section 2. In IRDAI or its officials do not involve in activities like sale of any kind of Section 2. In IRDAI or its officials do not involve in activities like sale of any kind of Section 2. In IRDAI or its officials do not involve in activities like sale of any kind of Section 2. In IRDAI or its officials do not involve in activities like sale of any kind of Section 2. In IRDAI or its officials do not involve in activities like sale of any kind of Section 2. In IRDAI or its officials do not involve in activities like sale of any kind of Section 2. In IRDAI or its officials do not involve in activities like sale of any kind of Section 2. In IRDAI or its officials do not involve in activities like sale of any kind of Section 2. In IRDAI or its officials do not involve in activities like sale of any kind of Section 2. In IRDAI or its officials do not involve in activities like sale of any kind of Section 2. In IRDAI or its officials do not involve

BEWARE OF SPURIOUS PHONE CALLS AND FICTITIOUS/FRAUDULENT OFFERS: IRDAI clarifies to public that: 1. IRDAI or its officials do not involve in activities like sale of any kind of insurance or financial products nor invest premiums, 2, IRDAI does not announce any bonus. Public receiving such phone calls are requested to lodge a police complaint along with details of phone call, number.