

## APPLICATION FOR PREMIUM RE-DIRECTION

**CONDITIONS TO BE READ BEFORE FILLING THE FORM:**

1. This form needs to be filled by the policyholder himself/herself in BLOCK LETTERS in black or blue ink.
2. Premium Re-direction (Allocation of Future Premium) would be effective from next premium due date.
3. This application will not be effective until it is officially accepted by Kotak Mahindra Life Insurance Company Ltd.
4. **Premium Re-direction will not affect the existing unit holdings.**
5. Two Financial Transaction cannot be processed on same day. (For Example – Premium Collection & Premium Redirection)
6. In order to abide by the Foreign Account Tax Compliance Act (FATCA), kindly submit an Insurance FATCA Declaration separately.  
I/We confirm that I/we shall report any future changes in my/our tax status to Kotak Life Insurance within 30 days of such change. I/We also confirm that until I/we provide a written intimation about any such changes, Kotak Life Insurance may presume that there is no change in my/our tax residency status and consider my/our earlier submitted declarations, if any, as valid. I understand that for any queries about my/our tax residency, I/we have to consult my/our own tax consultant.

Policy No.:		Plan Code:	
Plan Name:		Date:	D D M M Y Y Y Y
Title	Surname	First name	Middle name
Contact Details:		Email ID:	

Do your bit for a greener world by switching to e-communication. Kindly tick if you would like to receive your communication through electronic mode for all your policies.

**PAYMENT OPTIONS (Pay directly to my bank account mentioned here, please attach an Original cancelled cheque for any payment type)**

Payment remittance type	<input type="checkbox"/> Cheque	<input type="checkbox"/> Direct credit	
Name of the Policy holder as per Bank record			
Bank Name & Address		Account No:	
		IFSC Code	
Account Type	<input type="checkbox"/> Savings	<input type="checkbox"/> NRE*	<input type="checkbox"/> Others (if any)
		MICR Code	

\*Credit to NRE account can be given only if premiums are received from NRE account

**ALLOCATION OF FUTURE PREMIUM (PREMIUM RE-DIRECTION) :**

Note : To Change the existing fund holdings, please fill the 'Application for Funds Switch' form.  
I apply for all future premiums to be invested in proportion as follows :

Product Name/ Code	[ ] - Kotak Safe investment Plan II (KSI & K01) [ ] - Kotak Flexi Plan (KFP & K02) [ ] - Kotak Platinum Advantage Plan Shield A/c (K08) [ ] - Kotak Platinum Advantage Plus Shield A/c (K17 & K16)	To (%)	Available in
KGRG	Kotak Guaranteed Growth Fund (ULIF-013-27/06/03-GRTGWTFND-107)		KSI, K01, KFP, K02, K08, K16, K17
KBLG	Kotak Guaranteed Balanced Fund (ULIF-010-27/06/03-GRTBALFND-107)		KSI, K01, KFP, K02, K08
KBDF	Kotak Dynamic Bond Fund (ULIF-015-15/04/04-DYBNDFND-107)		KSI, K01, KFP, K02, K08
KFRF	Kotak Dynamic Floating Rate Fund (ULIF-020-07/12/04-DYFLTRFND-107)		KSI, K01, KFP, K02, K08
KGLF	Kotak Dynamic Gilt Fund (ULIF-006-27/06/03-DYGLTFND-107)		KSI, K01, KFP, K02, K08
FMMF	Money Market Fund (ULIF-041-05/01/10-MNMKKFND-107)		KSI, K01, KFP, K02, K08
FFEF	Frontline Equity Fund (ULIF-034-17/12/09-FRLEQFND-107)		KSI, K01, K02A, K02B, K16A, K17A, KFP1, KFP3, KULO
		100%	

- Notes : - In case of KSI, K01, K02A, K02B, K08A, K16A, K17A, KFP1, KFP3, KULO 'Frontline Equity Fund' is available only when the Capital Guarantee falls off.  
 - Once 'Frontline Equity Fund' has been opted for, customer cannot have his Capital Guarantee reinstated at any point of time.  
 - Dynamic Money Market Fund is available only in the last policy year.  
 - Guarantee & Front line Equity Fund is not available for KSIP with product code KULO & Joint Life KSIP policies.  
 - Kotak Platinum Adv. Plus product code K16 & K17, only Guaranteed Growth Fund is available.

Product Name/ Code	[ ] - Kotak Safe investment Plan II (K34) [ ] - Kotak Secure Invest Insurance (K41)	To (%)	Available in
FMMF	Money Market Fund (ULIF-041-05/01/10-MNMKKFND-107)		K34 & K41
FFEF	Frontline Equity Fund (ULIF-034-17/12/09-FRLEQFND-107)		K34 & K41
GRTF	Guarantee Fund (ULIF-048-05/02/10-GRTFND-107)		K34 & K41
		100%	

- Notes : - 'Frontline Equity Fund' is available only when the Capital Guarantee falls off.  
 - Once 'Frontline Equity Fund' has been opted for, customer cannot have his Capital Guarantee reinstated at any point of time.

Product Name/ Code	[ ] - Kotak Single Invest Plus (K78)	To (%)	Available in
FMMF	Money Market Fund (ULIF-041-05/01/10-MNMKKFND-107)		K03
FCOF	Classic Opportunities Fund (ULIF-033-16/12/09-CLAOPPFND-107)		K03
FFEF	Frontline Equity Fund (ULIF-034-17/12/09-FRLEQFND-107)		K03
KBDF	Kotak Dynamic Bond Fund (ULIF-015-15/04/04-DYBNDFND-107)		K03
KGLF	Kotak Dynamic Gilt Fund (ULIF-006-27/06/03-DYGLTFND-107)		K03
		100%	

Policy No. \_\_\_\_\_ Signature of Scribe \_\_\_\_\_ Signature of Policyholder \_\_\_\_\_

Product Name/ Code		To (%)	Available in
	[ ] - Kotak Retirement Plans (unit-Linked) (K04A, K04B & K04C) [ ] - Kotak Secure Retirement Plan (K18) [ ] - Kotak Retirement Income Plan (KRI1, KRI2, KRI3)		
KGRP	Kotak Pension Growth Fund (ULIF-030-07/01/09-PNGWTFND-107)		K18
KBLP	Kotak Pension Balanced Fund (ULIF-011-27/06/03-PNBALFND-107)		K04A, K04B, K04C, K18, KRI1, KRI2, KRI3
KBDP	Kotak Pension Bond Fund (ULIF-017-15/04/04-PNBDFND-107)		K04A, K04B, K04C, K18, KRI1, KRI2, KRI3
KFRP	Kotak Pension Floating Rate Fund (ULIF-022-07/12/04-PNFLTRFND-107)		K04A, K04B, K04C, K18, KRI1, KRI2, KRI3
KGLP	Kotak Pension Gilt Fund (ULIF-008-27/06/03-PNGLTFND-107)		K04A, K04B, K04C, K18, KRI1, KRI2, KRI3
PMMF	Pension Money Market Fund II (ULIF-039-28/12/09-PNMNMKFND-107)		K04A, K04B, K04C, KRI1, KRI2, KRI3
PFEF	Pension Frontline Equity Fund (ULIF-044-11/01/10-PNFRLEQFND-107)		K04A, K04B, K04C, K18A, KRI1, KRI2, KRI3
		100%	

- Notes : - Pension Growth Fund is available only with Kotak Secure Retirement Plan (K18) and not available with Kotak Retirement Plans (K04A, K04B & K04C)  
- Pension Money Market Fund II is available only in the last policy year.  
- Pension Frontline Equity Fund is available in K04A, K04B, K04C, K18A, KRI1, KRI2, KRI3

Product Name/ Code		To (%)	Available in (For Policies issued on or prior to 31st Dec 2009)
	[ ] - Kotak Easy Growth (KEG) [ ] - Kotak Long Life Secure Plus and Wealth Plus (K13,K14) [ ] - Kotak Headstart Future Protect and Assure Wealth (K05 & K06) [ ] - Kotak Smart Advantage (K12) [ ] - Kotak Platinum Adv Plus Dynamic A/c (K08, K16 & K17)		
KAGF	Kotak Aggressive Growth Fund (ULIF-018-13/09/04-AGRWFND-107)		KEG, K05, K06, K08, K13, K14, K16, K17
KGRF	Kotak Dynamic Growth Fund (ULIF-012-27/06/03-DYGWTFND-107)		KEG, K05, K06, K08, K13, K14, K16, K17
KBLF	Kotak Dynamic Balanced Fund (ULIF-009-27/06/03-DYBALFND-107)		KEG, K05, K06, K08, K13, K14, K16, K17
KFRF	Kotak Dynamic Floating Rate Fund (ULIF-020-07/12/04-DYFLTRFND-107)		KEG, K05, K06, K08, K13, K14, K16, K17
KGLF	Kotak Dynamic Gilt Fund (ULIF-006-27/06/03-DYGLTFND-107)		KEG, K05, K06, K08, K13, K14, K16, K17
FMMF	Money Market Fund (ULIF-041-05/01/10-MNMKKFND-107)		K05, K06, K08, K13, K14, K16, K17
KBDF	Kotak Dynamic Bond Fund (ULIF-015-15/04/04-DYBNDFND-107)		KEG, K05, K06, K08, K12, K13, K14, K16, K17, K20
KOPF	Kotak Opportunities Fund (ULIF-029-02/10/08-OPPFND-107)		K12, K05, K06, K13, K14, K16, K17
KFLF	Dynamic Floor Fund (ULIF-028-14/11/06-DYFLRFND-107)		K12, K05, K06, K08, K13, K14, K16, K17
		100%	

- Notes : - Dynamic Money Market Fund is available only in the last policy year.  
- Headstart plans only for the following code (K05A, K05B, K06A, K06B, K05C, K05D, K06C & K06D).  
- Kotak Smart Advantage (K12) has only 3 fund option viz. Dynamic Bond Fund (KBDF), Dynamic Floor Fund (KFLF) & Opportunities Fund (KOPF)  
- Opportunities Fund (KOPF) & Dynamic Floor Fund (KFLF) is not available in Kotak Easy Growth Plan (KEG)  
- Opportunities Fund (KOPF) is not available in Kotak Platinum Adv Plus Dynamic A/c (K08)  
- In Kotak Smart Advantage Plan there is no unit allocation in the 1st policy year.  
- Kotak Money Market Fund is not available for Kotak Easy Growth (KEG).

Product Name/ Code		To (%)	Available in
	[ ] - Kotak Headstart Future Protect and Assure Wealth (K27 & K28) [ ] - Kotak Long Life Secure Plus and Wealth Plus (K29 & K30) [ ] - Kotak Platinum Edge (K31) [ ] - Kotak Single Invest (K33) - Policies Issued after 1.Jan.10 [ ] - Kotak Wealth Insurance Plan (K38) [ ] - Kotak Super Advantage (K23) [ ] - Kotak Headstart Child Assure (K40) [ ] - Kotak Ace Investment (K42) [ ] - Kotak Single Invest Advantage (43) [ ] - Kotak Platinum (K44) [ ] - Kotak Single Invest Plus (K56) [ ] - Kotak Wealth Insurance (K66) [ ] - Kotak Ace Investment (K67) [ ] - Kotak Single Invest Advantage (K69) [ ] - Kotak Headstart Child Assure (K64)		
KFRF	Dynamic Floating Rate Fund (ULIF-020-07/12/04-DYFLTRFND-107)		K27, K28, K29, K30, K31, K38, K40, K42, K44, K67, K64, K68, K66
FBLF	Balanced Fund (ULIF-037-21/12/09-BALKFND-107)		K27, K28, K29, K30, K31, K38, K40, K42, K44, K67, K64, K68, K66
FMMF	Money Market Fund (ULIF-041-05/01/10-MNMKKFND-107)		K27, K28, K29, K30, K31, K33, K38, K40, K42, K44, K67, K64, K68, K78, K66
KGLF	Dynamic Gilt Fund (ULIF-006-27/06/03-DYGLTFND-107)		K27, K28, K29, K30, K31, K33, K38, K40, K42, K44, K67, K69, K64, K68, K78, K56, K66
KBDF	Dynamic Bond Fund (ULIF-015-15/04/04-DYBNDFND-107)		K23, K27, K28, K29, K30, K31, K33, K38, K40, K42, K44, K67, K69, K64, K68, K78, K56, K66
FCOF	Classic Opportunities Fund (ULIF-033-16/12/09-CLAOPPFND-107)		K23, K27, K28, K29, K30, K31, K33, K38, K40, K42, K44, K67, K69, K64, K68, K78, K56, K66
FPEF	Frontline Equity Fund (ULIF-034-17/12/09-FRLEQFND-107)		K23, K27, K28, K29, K30, K31, K33, K38, K40, K42, K44, K67, K69, K64, K68, K78, K56, K66
FFLF	Dynamic Floor Fund II (ULIF-035-17/12/09-DYFLRFND2-107)		K23, K27, K28, K29, K30, K31, K33, K38, K40, K42, K44, K56
GPGF	Peak Guarantee Fund I (ULIF-049-14/02/10-PKGRTFND1-107)	NA	K31, K33, K67, K69, K64, K68, K78, K56, K66
		100%	

- Notes : - Switch In not allowed in peak guarantee fund (Post 30th April 10), only switch out is allowed for those customers who have opted for this fund.  
- In Kotak Super Advantage (K23) there is no unit allocation in the 1st policy year.

Policy No. \_\_\_\_\_ Signature of Scribe \_\_\_\_\_ Signature of Policyholder \_\_\_\_\_

