





## Fund Allocation (%)

Kotak Group Balanced Fund (ULGF-003-27/06/03-BALFND-107)	Kotak Group Bond Fund (ULGF-004-15/04/04-BNDFND-107)	Kotak Group Floating Rate Fund (ULGF-005-07/12/04-FLTRFND-107)	Kotak Group Gilt Fund (ULGF-002-27/06/03-GLTFND-107)	Kotak Group Prudent Fund (ULGF-019-04/07/17-KGPFND-107)
Kotak Group Money Market Fund (ULGF-001-27/06/03-MNMKFN-107)	Kotak Group Short Term Bond Fund (ULGF-018-18/12/13-SHTRMBND-107)	Kotak Group Equity Fund (ULGF02009/05/22KGREQUFUND107)	Kotak Group Nifty 50 Index Fund (ULGF027110226KGN107)	Kotak Group Pension Bond Fund (ULGF02109/05/22KGRPNBONFND107)
Kotak Group Pension Liquid Plus Fund (ULGF02209/05/22KGRPNLPFND107)	Kotak Group Pension Equity Fund (ULGF02309/05/22KGRPNEQFND107)	Kotak Group Pension Balanced Fund (ULGF02409/05/22KGRPNBLFND107)	Kotak Group Pension Gilt Fund (ULGF02509/05/22KGRPNGLFND107)	Kotak Group Pension Prudent Fund (ULGF026110226KGPP107)
Kotak Group Pension Nifty 50 Index Fund (ULGF028110226KGPNI107)				

## III. ADMINISTRATION AND EXPENSES DETAILS

Contribution payment method

Cheque

ECS (Please attach cancelled cheque)

Total Amount Payable

	Amount (Rs.)												
<input type="checkbox"/> Details Accumulated													
<input type="checkbox"/> Balance Contribution													
<input type="checkbox"/> Charges													
<input type="checkbox"/> Others (specify)													

Cheque Details

No.

Bank Branch Drawn On:

Amount

Cheque Date:

D	D	M	M	Y	Y	Y	Y
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Bank Details

Bank Name:

Branch:

\* Kindly note that bank details are a pre requisite for payment of claims through RTGS

Account No:

## IV. Details Of Brokers Appointed

Broker Name:

Date of Appointment:

D	D	M	M	Y	Y	Y	Y
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Broker License No:

## IV. DECLARATION

Kotak Corporate Benefit Plan is a Non-Participating, Unit-Linked, Life Insurance Group Savings Plan. The policy contract will be drafted with reference to both the proposal form and applicable terms and conditions.

I/We, the undersigned, declare for and on behalf of \_\_\_\_\_ (full name of the proposer) that:

1. Pursuant to the Tender no.

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Dated

D	D	M	M	Y	Y	Y	Y
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I / We are herewith submitting this proposal to Kotak Mahindra Life Insurance Company Ltd. [KLI] for a Kotak Corporate Benefit Plan Policy in our favour. In this regard I / we confirm having obtained consent of all/majority of members listed in the data provided with this Proposal Form.

2. I / We shall obtain such consent from all those eligible to participate in the policy that may be issued in our favour, pursuant to this Proposal Form.

3. The benefits, the basis on which the proposed Plan will operate, and the terms and conditions thereof, have been explained to me/us and I/we have fully understood and agreed to abide by them.

4. I / We understand and agree that cover under the Policy that may be issued in our favour shall not commence till all the necessary clarifications/documentations or other requirements raised by KLI are fulfilled. It is clarified that cover under the Policy shall commence from the date and in the manner indicated therein, subject to receipt of the prescribed premiums by KLI.



SECTION 41 OF THE 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.

SECTION 45 OF THE INSURANCE ACT, 1938, as amended from time to time: The provisions of Section 45 of the Insurance Act, 1938 are applicable in the above contract. Please refer to Section 45 either on our website or contact our intermediary or visit the nearest branch for the full text.

[https://www.kotaklife.com/assets/images/uploads/why\\_kotak/section38\\_39\\_45\\_of\\_insurance\\_act\\_1938.pdf](https://www.kotaklife.com/assets/images/uploads/why_kotak/section38_39_45_of_insurance_act_1938.pdf)

Free Look Period : The policyholder is offered 30 days (except for policies having a cover term of less than a year) free look period from the date of receipt of the policy document wherein the policyholder may choose to return the policy within 30 days of receipt if s/he is not agreeable with any of the terms and conditions of the plan and receive the applicable refund amount. For Group Policies, the refund amount shall be payable to the Group Master Policyholder

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**Kotak Mahindra Life Insurance Company Ltd**

Regn. No.: 107, CIN: U66030MH2000PLC128503, Regd. Office: 8th Floor, Plot # C- 12, G- Block, BKC, Bandra (E), Mumbai - 400 051.  
Website: <https://www.kotaklife.com> | Email: [kli.groupoperations@kotak.com](mailto:kli.groupoperations@kotak.com) | Toll Free No: 18001207856

Form No. Jan\2026\302149

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