



CONDITIONS TO BE READ BEFORE FILLING THE FORM

- This switch/redirection (Future Contribution Allocation) request shall be subject to all the terms and conditions laid down in the policy contract in this regard.
- The switch/redirection request shall be processed subject to availability of the required number of units or amount as requested by the member. Should the number of units or value be insufficient, the number of units or amount up to the maximum available extent shall be processed.
- Switching shall be done by liquidating the units of one fund (from which units/value are switched out) at the prevailing unit price, and converting the money so realised into units of the desired fund at the prevailing unit price.
- In respect of contribution/funds switch request received up to 3.00 p.m. by the insurer along with a local cheque or a demand draft payable at par at the place where the contribution/funds switch is received, the closing NAV of the day on which contribution/funds switch is received shall be applicable.
- In respect of contribution/funds switch request received after 3.00 p.m. by the insurer along with a local cheque or a demand draft payable at par at the place where the contribution/funds switch is received, the closing NAV of the next business day shall be applicable.
- This application will not be effective until it is officially accepted by the company.

Policy number _____ **Date** _____
Scheme name _____ **UIN** _____

Fund #	Switch From		Switch To		Future Allocation* % of Future Premium
	% of Holding	Amount (Rs.)	% of Amount Disinvested	Amount (Rs.)	
Group Floating Rate Fund (ULGF-005-07/12/04-FLTRFND-107)					
Group Gilt Fund (ULGF-002-27/06/03-GLTFND-107)					
Group Bond Fund (ULGF-004-15/04/04-BNDFND-107)					
Group Balanced Fund (ULGF-003-27/06/03-BALFND-107)					
Group Dynamic Floor Fund (ULGF-015-07/01/10-DYFLRFND-107)					
Group Secure Capital Fund (ULGF-016-12/04/11-SECCAPFND-107)					
Group Money Market Fund (ULGF-001-27/06/03-MNMKFND-107)					
Group Short Term Bond Fund (ULGF-018-18/12/13-SHTRMBND-107)					
Group Prudent Fund (ULGF-019-04/07/17-KGPFFND-107)					
Kotak Group Nifty 50 Index Fund (ULGF027110226KGN107)					
Kotak Group Equity Fund (ULGF02009/05/22KGREQUFUND107)					
Total			100%		

- Please note:**
- # Allocation percentages are subject to provisions of relevant regulations/directions/guidelines issued from time to time by Insurance Regulatory and Development Authority (IRDAI).
 - * If future allocation column is left blank, it will be deemed that you want to maintain the existing fund allocation across funds.

*I apply to switch percentage/amounts from/to the fund held in my account under this scheme as indicated above.
 I hereby declare that I understand and agree to all the conditions and information given above.*

Keep my existing fund allocation for the future contribution.

Date _____

(Signature of the trustees along with trust seal)



For any further queries please get in touch with
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