

## APPLICATION FOR TOP-UP PREMIUM

### INSTRUCTIONS FOR FILLING UP THE FORM

#### 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. For Top Up premium received via Cash mode or Local Clearance Cheque/ Demand Draft before cut off time (3 pm) on a business day, the applicable NAV shall be closing NAV of the same business day.
3. For Top Up premium received via Cash mode or Local Clearance Cheque/ Demand Draft after cut off time (3 pm) on a business day, the applicable NAV shall be closing NAV of the next business day.
4. For Top Up premium received via Outstation Cheque/ Demand Draft, the closing NAV of the day on which cheque/demand draft is credited shall be applicable.
5. The policy holder must sign on cancellation or alteration. 6. This application will not be effective until it is officially accepted by Kotak Mahindra Life Insurance Company Ltd.
7. Top-Up processing may be subject to underwriting risk acceptance, as applicable. In cases where underwriting risk rejection is received after the unit allocation (as explained in points 2 to 4 above) Fund Value as on the date of rejection shall be payable depending on the cut off time (3PM) on a business day. Where underwriting risk rejection is received before the unit allocation, top-up premium amount shall be refunded.

**Note:** 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.

### 1. PARTICULARS OF THE POLICYHOLDER

CLIENT ID

FULL NAME OF POLICY OWNER

Title	Surname	First name	Middle name
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

Contact No.:

Email:

**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.**

### 2. PARTICULARS OF LIFE INSURED

CLIENT ID (For existing Kotak Life Insurance policyholders)

FULL NAME (Please leave a gap between each part of the name)

Title	Surname	First name	Middle name
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

Is the life insured presently in good health? (Applicable for Kotak Capital Multiplier Plan)  Yes  No

If, No, please give details.

### 3. PARTICULARS OF TOP-UP PREMIUM

Policy No :

NAME OF THE PLAN :

MODE OF PAYMENT :  Cheque/DD  Cash (Should you choose to pay premium by cash, you are advised to do so at the nearest Kotak Life Insurance branch only)

BANK NAME WITH BRANCH LOCATION

ACCOUNT NO.

Cheque/DD No.	Dated	Amount (in Rs.)	Drawn on (Name of bank and branch)
<input type="text"/>	D D M M Y Y . Y Y	<input type="text"/>	<input type="text"/>

### 4. ALLOCATION OF TOP-UP PREMIUMS TO INVESTMENT PORTFOLIOS (Total must be equal to 100%)

% Of Allocation	Fund Code	Fund Name
<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>
100 %		Total

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

Payment remittance type  Cheque  Direct credit

Name of the Policy holder as per Bank record

Bank Name & Address

Account No:

IFSC Code

Account Type  Savings  NRE\*  Others (if any)

MICR Code

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



## Annexure I (For information only)

## Fund available for Top-Up

Plan Name	Product Code	Kotak Opportunity Fund	Kotak Balanced Fund	Kotak Bond Fund	Kotak Gift Fund	Kotak Growth Fund	Kotak Aggressive Growth Fund	Kotak Floor Fund	Kotak Floating Rate Fund	Kotak Money Market Fund	Pension Bond Fund	Pension Opportunity Fund	Pension Floor Fund	Money Market Fund	Balanced Fund	Dynamic Floor Fund II	Frontline Equity Fund	Classic Opportunities Fund	Guarantee Fund	Pension Money Market Fund II	Pension Balanced Fund II	Pension Floor Fund II	Pension Frontline Equity Fund	Pension Classic Opportunities Fund	Pension Guarantee Fund
Kotak Easy Growth Plan-5 Times	KEG1 KEG2 KEG3	KOPF		KBDF	KGLF	KGRF	KAGF	-----	KFRF	FMMF	-----	-----	FMMF	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----
Kotak Easy Growth Plan-1.25	KEG4	KOPF		KBDF	KGLF	KGRF	KAGF	-----	KFRF	FMMF	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----
Kotak Safe Investment Plan - Low cover	K01A	-----		KBDF	KGLF	KGRF	KAGF	-----	KFRF	FMMF	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----
Kotak Safe Investment LPP - Low cover	K01B	-----	KBLF	KBDF	KGLF	KGRF	KAGF	-----	KFRF	FMMF	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----
Kotak Safe Investment Plan - High cover	K01C	-----	KBLF	KBDF	KGLF	KGRF	KAGF	-----	KFRF	FMMF	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----
Kotak Safe Investment LPP - High cover	K01D	-----	KBLF	KBDF	KGLF	KGRF	KAGF	-----	KFRF	FMMF	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----
# For Old Kotak Safe Investment Plans who Opted to switch to new funds prior to March 15, 2010	K01	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	FFEF	-----	FGRF	-----	-----	-----	-----	-----	-----
Kotak Flexi Plan / Kotak Flexi Plan LPP	K02A / K02B	-----	KBLF	KBDF	KGLF	KGRF	KAGF	-----	KFRF	FMMF	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----
Kotak Flexi Plan (before guidelines)	KFP1, KFP2, KFP3, KFP4	-----	KBLF	KBDF	KGLF	KGRF	KAGF	-----	KFRF	FMMF	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----
Kotak Retirement Plan Single Prem (Unit Linked)	K04A	KOPF	KBLP	KBDP	KGLP	-----	-----	-----	KFRP	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	PMMF	-----	-----	PFEF	-----	-----
Kotak Retirement Plan With Cover (Unit Linked)	K04B	KOPF	-----	KBDP	KGLP	-----	-----	-----	KFRP	PMMF	-----	-----	-----	-----	-----	-----	-----	-----	-----	PMMF	-----	-----	PFEF	-----	-----
Kotak Retirement Plan Without Cover (UnitLinked)	K04C	KOPF	KBLP	KBDP	KGLP	-----	-----	-----	KFRP	PMMF	-----	-----	-----	-----	-----	-----	-----	-----	-----	PMMF	-----	-----	PFEF	-----	-----
Kotak Retirement Income Plan (Unit Linked) Single Premium (before UL guidelines)	KR1	-----	-----	-----	-----	-----	-----	-----	KFRP	-----	KBDP	-----	-----	-----	-----	-----	-----	-----	-----	PMMF	-----	-----	PFEF	-----	-----
"Kotak Retirement Income Plan - Unit Linked With Cover (before UL guidelines) Kotak Retirement Income Plan- Unit Linked Without Cover (before UL guidelines)"	"KR1 2 KR13"	-----	KBLP	KBLP	KGLP	-----	-----	-----	KFRP	PMMF	KBDP	-----	-----	-----	-----	-----	-----	-----	-----	PMMF	-----	-----	PFEF	-----	-----
HeadStart Future Protect -Single Life / Joint Life	K05A, K05B, K05C, K05D	KOPF	KBLF	KBDF	KGLF	KGRF	KAGF	KFLF	KFRF	FMMF	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----
HeadStart Assurewealth-Single Life / Joint Life	K06A, K06B, K06C, K06D	KOPF	KBLF	KBDF	KGLF	KGRF	KAGF	KFLF	KFRF	FMMF	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----
# For Old Headstart Plans who Opted to switch to new funds prior to March 15, 2010	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	FFLF	FFEF	FCOF	-----	-----	-----	-----	-----	-----	-----
Kotak Platinum Advntage Shield / Dynamic / Risk	K08A, K08B, K08C	KOPF	KBLF	KBDF	KGLF	KGRF	KAGF	KFLF	KFRF	FMMF	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----
Kotak Plt Adv Plus Shld double / Single	K17A, K17B, K17C	KOPF	KBLF	KBDF	KGLF	KGRF	KAGF	KFLF	KFRF	FMMF	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----
Kotak Smart Advantage - Regular / Limited	"K12A, K12B"	KOPF	-----	KBDF	-----	-----	-----	KFLF	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----
Kotak Long Life Secure Plus - Regular/ Limited/ Inbuilt Benefit	"K13A, K13B, K13C"	KOPF	KBLF	KBDF	KGLF	KGRF	KAGF	KFLF	KFRF	FMMF	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----
Kotak Long Life Wealth Plus - Regular / Limited	"K14A, K14B"	KOPF	KBLF	KBDF	KGLF	KGRF	KAGF	KFLF	KFRF	FMMF	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----
# For Old Long Life Plans who Opted to switch to new funds prior to March 15, 2010	K13, K14	-----	-----	-----	-----	-----	-----	-----	-----	FMMF	-----	-----	-----	-----	-----	FFLF	FFEF	FCOF	-----	-----	-----	-----	-----	-----	-----
Kotak Secure Retirement Plan	K18A	-----	KBLP	KBDP	KGLP	KGRP	-----	-----	KFRP	-----	KBDP	-----	KGLP	-----	-----	-----	PFEF	-----	-----	-----	-----	-----	-----	-----	-----
Kotak Second Innings Plan	K19A	-----	-----	-----	-----	-----	-----	-----	-----	-----	KBDP	KOPP	KFLP	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----
# For Old Second Innings Plans who Opted to switch to new funds prior to March 15, 2010	K19A	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	FFLF	FFEF	FCOF	-----	-----	-----	-----	-----	-----	-----
Kotak Single Invest Plan (5x5P)	K20	No Top Up	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----
New HeadStart Future Protect-Single Life/Joint Life	K27, K28	-----	-----	KBDF	KGLF	-----	-----	-----	KFRF	-----	-----	-----	-----	FMMF	FBLF	FFLF	FFEF	FCOF	-----	-----	-----	-----	-----	-----	-----
New Kotak Long Life Secure Plan	K29, K30	-----	-----	KBDF	KGLF	-----	-----	-----	KFRF	-----	-----	-----	-----	FMMF	FBLF	FFLF	FFEF	FCOF	-----	-----	-----	-----	-----	-----	-----
Guaranteed Pension Builder	K24	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	PMMF	-----	-----	-----	-----	PGUF
Kotak Super Advantage	K23	-----	-----	KBDF	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	FFLF	FFEF	FCOF	-----	-----	-----	-----	-----	-----	-----
Kotak Platinum Edge	K31	-----	-----	KBDF	KGLF	-----	-----	-----	KFRF	-----	-----	-----	-----	FMMF	FBLF	FFLF	FFEF	FCOF	-----	-----	-----	-----	-----	-----	-----
New Kotak Second Innings	K32	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	PMMF	PBLF	PFLF	PFEF	PCOF	-----
New Kotak Safe Investment Plan II	K34	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	FMMF	-----	-----	FFEF	-----	FGRF	-----	-----	-----	-----	-----	-----
Kotak Wealth Insurance Plan	K38	-----	-----	KBDF	KGLF	-----	-----	-----	KFRF	-----	-----	-----	-----	FMMF	FBLF	FFLF	FFEF	FCOF	-----	-----	-----	-----	-----	-----	-----
Kotak ACE Investment Plan	K42	-----	-----	KBDF	KGLF	-----	-----	-----	KFRF	-----	-----	-----	-----	FMMF	FBLF	FFLF	FFEF	FCOF	-----	-----	-----	-----	-----	-----	-----
Kotak Single Invest Plan	K33	-----	-----	KBDF	KGLF	-----	-----	-----	-----	-----	-----	-----	-----	FMMF	-----	FFLF	FFEF	FCOF	-----	-----	-----	-----	-----	-----	-----
Kotak Single Advantage Plan	K43	-----	-----	KBDF	KGLF	-----	-----	-----	-----	-----	-----	-----	-----	FMMF	-----	FFLF	FFEF	FCOF	-----	-----	-----	-----	-----	-----	-----
Kotak Headstart Child Plan	K40	-----	-----	KBDF	KGLF	-----	-----	-----	KFRF	-----	-----	-----	-----	FMMF	FBLF	FFLF	FFEF	FCOF	-----	-----	-----	-----	-----	-----	-----
Kotak Platinum Plan	K44	-----	-----	KBDF	KGLF	-----	-----	-----	KFRF	-----	-----	-----	-----	FMMF	FBLF	FFLF	FFEF	FCOF	-----	-----	-----	-----	-----	-----	-----
Kotak Invest Maxima Plan	K51**	-----	-----	KBDF	-----	-----	-----	-----	-----	FMMF	-----	-----	-----	-----	FBLF	-----	FFEF	FCOF	-----	-----	-----	-----	-----	-----	-----
Kotak Invest Maxima Plan	K65**	-----	-----	KBDF	-----	-----	-----	-----	-----	FMMF	-----	-----	-----	-----	FBLF	-----	FFEF	FCOF	-----	-----	-----	-----	-----	-----	-----
Kotak Single Invest Advantage	K83**	-----	-----	KBDF	KGLF	-----	-----	-----	-----	FMMF	-----	-----	-----	-----	-----	-----	FFEF	FCOF	-----	-----	-----	-----	-----	-----	-----
Kotak Platinum	K84**	-----	-----	KBDF	KGLF	-----	-----	-----	KFRF	FMMF	-----	-----	-----	-----	FBLF	-----	FFEF	FCOF	-----	-----	-----	-----	-----	-----	-----
Kotak Ace Investment	K86**	-----	-----	KBDF	KGLF	-----	-----	-----	KFRF	FMMF	-----	-----	-----	-----	FBLF	-----	FFEF	FCOF	-----	-----	-----	-----	-----	-----	-----

\* Incase of Kotak Safe Investment Plan II 'Frontline Equity Fund' is available only when guarantee / capital guarantee falls off. \*\* This will be applicable if policy is in Self managed strategy; If strategy is to be changed, refer Investment Strategy form