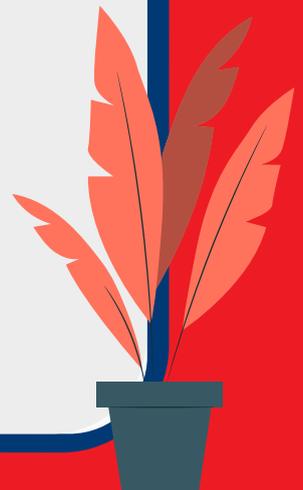


MY DIGITAL GUIDE

AVAIL OUR
SERVICES WITH
JUST A CLICK



WELCOME TO THE KOTAK LIFE FAMILY

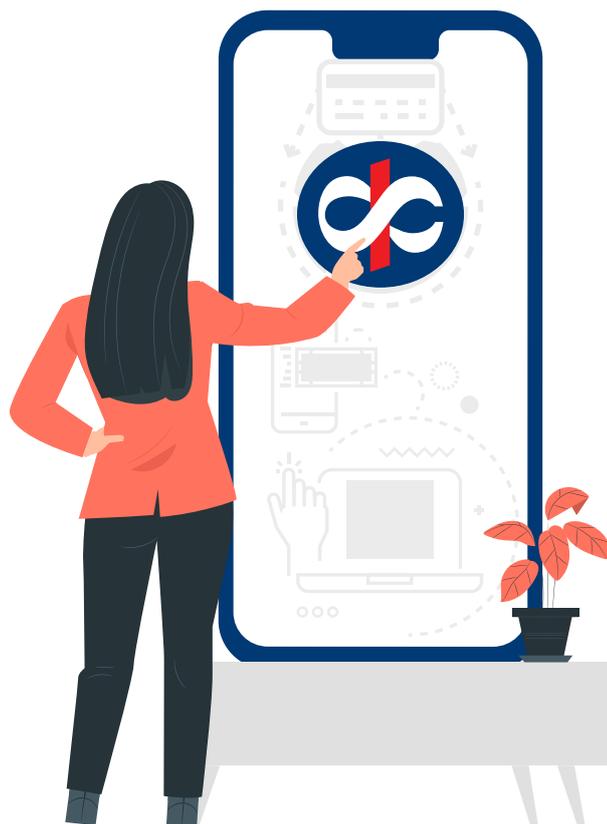
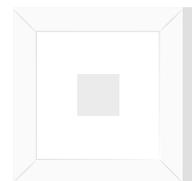
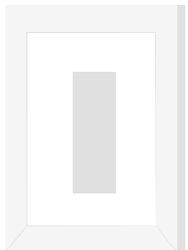
Dear Policy Holder,

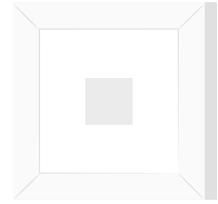
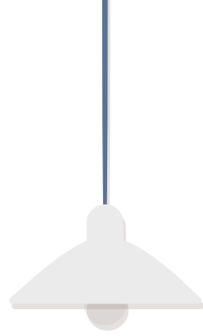
Thank you for choosing Kotak Life as your partner for a safer, worry-free future.

At Kotak Life, your convenience is our top priority. And this digital guide ensures the same.

The purpose of this guide is to help you get a better understanding of how you can avail our services through different digital touchpoints.

With this at your disposal, you can easily access all our services with just a click.





WHAT TO **EXPECT?**

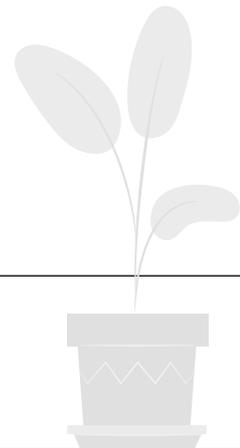
01. Introduction to our digital touchpoints..... **04**

02. Policy service queries made convenient..... **08**

03. Policy service requests made easy..... **09**

04. Servicing forms in a single click..... **10**

05. Know how it is done the digital way..... **11**



INTRODUCTION TO OUR

DIGITAL TOUCHPOINTS

We are available
on various
mediums



KAYA

Virtual Assistant



WhatsApp

Messaging Platform



Online Policy Manager

Customer Service Portal



Query Form

Customer Service Web-Form



Smart Interactive Voice Response(IVR)

IVR Service



KAYA



AI-enabled interactive chat platform



24/7 availability of bot level support and services



Agent support availability from 8am – 8pm (Mon – Fri)



Ability to interpret and respond in English & Hindi

[Click Here](#)

WhatsApp



Easy access to your policy(s) at your fingertips



Select the services from a list of options without any manual inputs



24/7 serviceability



Auto verification on the basis of registered mobile nos.



Download statements/soft copy of policy document instantly

[Click Here](#)



Online Policy Manager



One-stop destination for online policy services



Login through your registered contact details or email id.

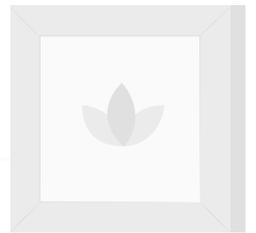


Simple one-step OTP verification process for secure transactions



User-friendly interface to promote ease of navigation

[Click Here](#)



Query Form



Web-form based query management solution



Hassle-free platform with pre-filled requisites instead of drafting emails

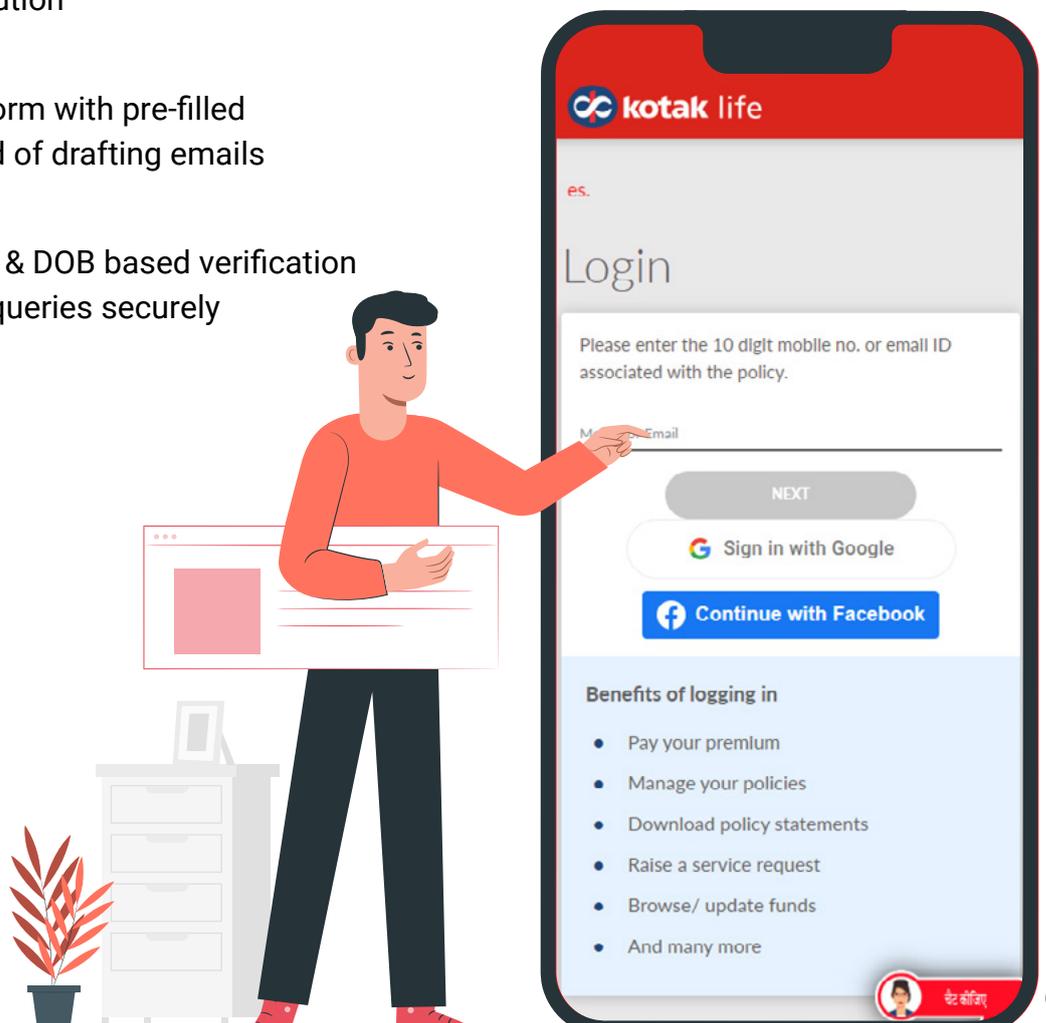


Simple Policy no. & DOB based verification process to raise queries securely



24/7 serviceability

[Click Here](#)



Smart Interactive Voice Response (IVR)



Agent-free request processing on Smart IVR



Instant solution on Smart IVR without any waiting time

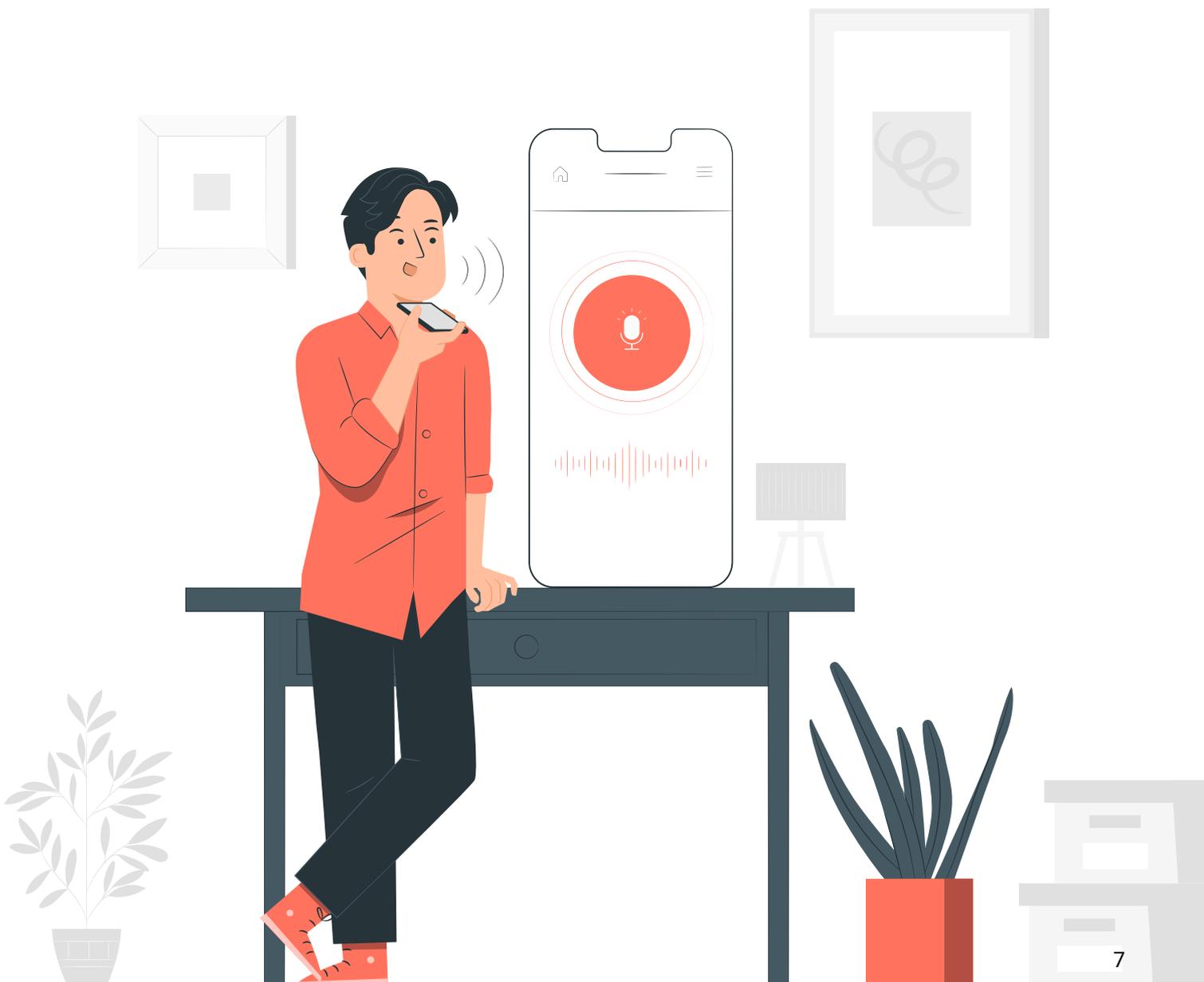


Get statements and know values instantly



Easy navigation and quick access to frequently asked requests and queries

Call us @ 18002098800



POLICY SERVICE QUERIES

MADE CONVENIENT

					
	Online Policy Manager	WhatsApp	KAYA	Query Form	Smart IVR
ECS Account Details	-	Yes	Yes	Yes	-
Existing Policy Details	Yes	Yes	Yes	Yes	Yes
Fund & Bonus Value	Yes	Yes	Yes	Yes	Yes
Life Assured Details	Yes	-	-	-	-
Life Covered Details	Yes	-	-	Yes	Yes
Policy Dispatch Status	-	-	Yes	Yes	-
Policy Document	Yes	Yes	Yes	-	-
Policy Term / Premium Paying Term	Yes	Yes	Yes	Yes	Yes
Premium Certificate	Yes	Yes	Yes	Yes	Yes
Premium Deposit Receipt	Yes	Yes	Yes	Yes	Yes
Renewal Notice	Yes	-	-	Yes	Yes
Unit Linked Statement	Yes	Yes	Yes	Yes	Yes

POLICY SERVICE REQUESTS

MADE EASY

	 Online Policy Manager	 WhatsApp	 KAYA	 Query Form	 Smart IVR
Activate ECS	Yes	Yes	Yes	-	-
Address Change	Yes	Yes	Yes	Yes	-
Bank Details Updation	Yes	Yes	Yes	Yes	-
Claims	-	Yes	Yes	Yes	Yes
Contact No. Update	Yes	Yes	Yes	Yes	Yes
Email Update	Yes	Yes	Yes	Yes	Yes
Fund Allocation	Yes	-	-	-	-
Fund Switch	Yes	Yes	Yes	Yes	-
Future Premium Allocation	Yes	-	-	Yes	-
Major Revival	Yes	-	Yes	Yes	-
Nominee Change	Yes	Yes	Yes	Yes	-
PAN Updation	Yes	-	-	Yes	-
Premium Mode Change	Yes	Yes	Yes	Yes	-
Rider Addition	Yes	-	-	Yes	-
TDS Certificate	Yes	-	-	Yes	-
Think Green	Yes	-	-	-	-

SERVICING FORMS IN A SINGLE CLICK

Browse through these frequently requested forms & get the one you are looking for with just a click!

<p>Aadhar Consent Form</p> <p>Click Here</p> 	<p>Minor Policy Alteration Form</p> <p>Click Here</p> 	<p>ECS/ Redebit Form</p> <p>Click Here</p> 
<p>Payout Request Form</p> <p>Click Here</p> 	<p>Policy Loan Form</p> <p>Click Here</p> 	<p>Certificate of Existence</p> <p>Click Here</p> 
<p>Investment Strategy Switch Form</p> <p>Click Here</p> 	<p>Duplicate Policy Issuance Form</p> <p>Click Here</p> 	<p>Contact Details Update Form</p> <p>Click Here</p> 
<p>Fund Switch Form</p> <p>Click Here</p> 		

**Didn't find the form you were looking for?
Access the entire library by just clicking the link below**

[Click Here](#)

KNOW HOW IT IS DONE

THE DIGITAL WAY

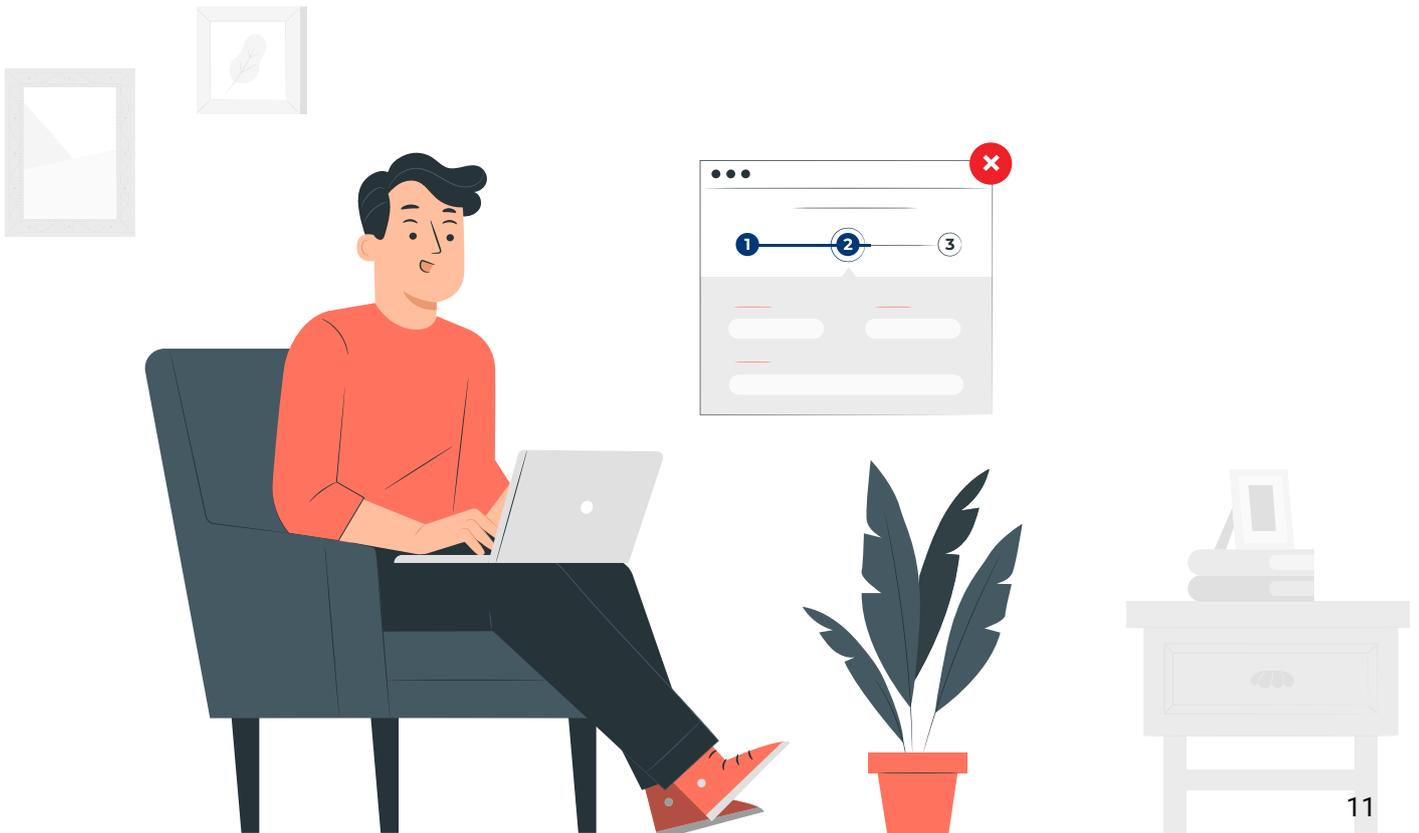
01. How can I get the maturity payout?

○ Click [here](#) >> “Policy Related information” >> “Maturity” >> “Maturity Query”

○ Validate with your **Policy Number** & **DOB** to upload the following documents (scanned in a single PDF file not exceeding 10mb):

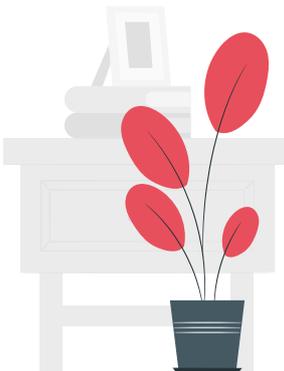
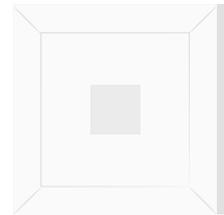
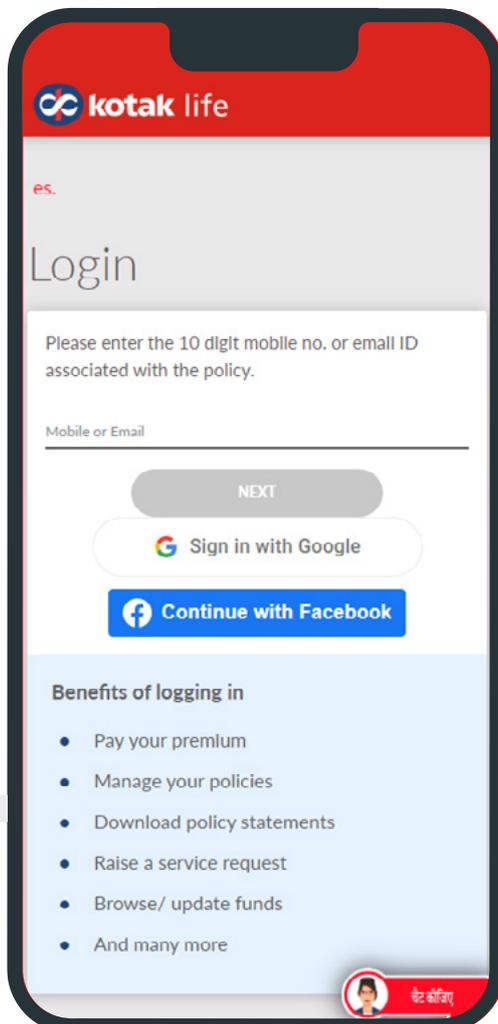
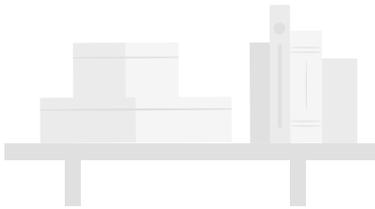
- Maturity Payout Form ([Click here](#))
- KYC – ID and Address Proof (If proof submitted is Aadhaar Card, also share the Aadhaar Consent Form)
- Personalized Cancelled Cheque (Name, Account No. and IFSC code to be printed)

○ Click Submit



02. How can I update my bank details?

- Click [here](#)
- Validate your registered **mobile/email** and **verify through an OTP**
- Go to **“Personal Details” >> “Bank Details” >> Edit icon**
- Enter the Bank Account Number, IFSC Code, Bank Name, Account Type and your name as in Bank Records and click on Verify
- The request can be tracked within the Online Policy Manager, under the case history section and it takes 48 working hours for the request to be processed



03. How can I pay my premium via different options?

- For Net Banking/ Debit Card Payments: Visit [here](#) & pay through any of the banks listed on our website
- For Credit Card Payments: Pay using your [VISA credit card](#)
- For Mobile Payments (IMPS): Visit [here](#) & pay through any of the banks listed on our website
- For Bill Desk Payments: Log on to www.billdesk.com and register to pay via bill desk
- For more payment options, visit [here](#)

04. How can I register for ECS/ NACH?



Option 1 via **Whatsapp**,

- Send '**Hi**' to **9321002007**, from your registered number
- Choose '**More Options**' from the "**Menu**"
- Select '**ECS/Autopay Registration**'
- Choose the policy against which ECS needs to be registered
- Click '**Send**'

or





Option 2 via **KAYA, Webchat**

- Visit [here](#) and click the **'Let's Chat'** Icon
- Choose **"Raise Service Request" >> "ECS/Autopay Registration"**
- Authenticate your Registered Number, and click on View ECS Details for the corresponding policy where the ECS needs to be registered
- Choose if you want to register for ECS through **"Kotak Mahindra Bank"** or **"Any Other Bank"**
- You will be provided with a **"Direct Debit Link"** for Kotak Mahindra Bank and a **"DNach Link"** for other banks for registration

or

Option 3 via **Online Policy Manager,**

- Login using your mobile number or email ID
- Under 'Frequently used services' select **"Activate ECS"**
- Select the policy number for which you want to activate ECS
- Click on Activate ECS button

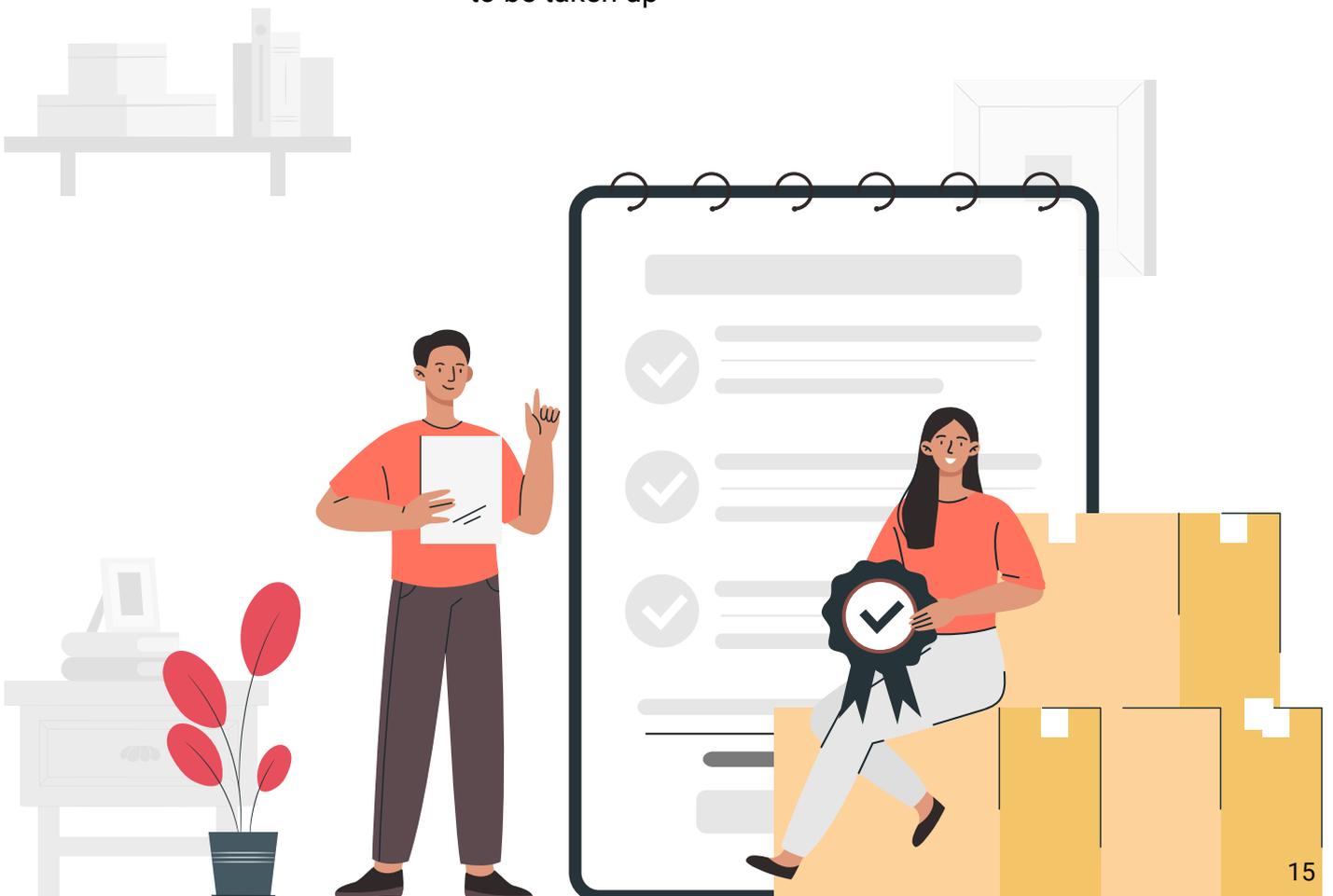
Please Note:

ECS/Autopay Registration takes 48 hrs time for processing.

For other modes of ECS/Autopay registration, you will be guided with all the necessary documents and a downloadable ECS Mandate Form that you can submit at a nearest KLI branch.

05. How can I revive my policy?

- Online revival of Policy is applicable only if Policy Owner and Life Assured are same
- Click [here](#) and validate your registered mobile/email through an OTP
- On the policies dashboard, the Policy that needs to be revived will be highlighted as “**Revive Policy**”
- Selecting the Policy, you will be taken to the Premium Payment page where the due payment is displayed, then click on Pay securely button to clear any outstanding premiums along with **Handling Charges** (if applicable)
- Fill up the questionnaire and accept the terms and conditions
- Also upload Documents (**Major Revival Form** ([Click here](#)) & **Personalized Cancel Cheque**) and click submit for the request to be taken up



Just click the link below to access the entire playlist related to frequently asked queries



Kotak Life website:

[Click Here](#)

Always Remember:

- Cash payments only at Kotak Life/Bank branches
- Never share confidential information about yourself and your policy
- Buy your policy from a licensed agent
- Trust emails from official domains only
- Avoid any offer to surrender your policy
- Don't fall prey to fake calls & people posing as representatives of Kotak Life Insurance or IRDAI Officials





 *Hum hain... hamesha*

BEWARE OF SPURIOUS PHONE CALLS AND FICTITIOUS / FRAUDULENT OFFERS

IRDAI is not involved in activities like selling insurance policies, announcing bonus or investment of premiums. Public receiving such phone calls are requested to lodge a police complaint.

Kotak Mahindra Life Insurance Company Ltd. CIN : U66030MH2000PLC128503, Regn. No. 107.

Regd. Office: 8th Floor, Plot # C- 12, G- Block, BKC, Bandra (E), Mumbai - 400 051.

Website: www.kotaklife.com | **WhatsApp:** 9321003007 | **Toll Free No.:** 1800 209 8800.

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