

IN THIS POLICY, THE INVESTMENT RISK IN INVESTMENT PORTFOLIO IS BORNE BY THE POLICYHOLDER

Tata AIA Life Lakshya Supreme (UIN 110L091V01)	Tata AIA Life InvestAssure Plus Supreme (UIN 110L092V01)
Tata AIA Life InvestAssure Flexi Supreme (UIN 110L090V01)	Tata AIA Life Insurance United Ujjwal Bhawishya Supreme (UIN 110L094V01)
Tata AIA Life Insurance Swarna Pratigya (UIN 110L096V01)	Tata AIA Life Insurance InvestAssure Gold Supreme (UIN 110L097V01)
Tata AIA Life Insurance InvestAssure Maximizer (UIN 110L098V01)	Tata AIA Life Insurance Gyan Kosh (UIN110L099V01)

REQUEST FOR CHANGE FORM

Policy Number:

PAN Number (Policyholder)

Name of Insured: _____ Attach PAN Card copy if Top up Premium is greater than or equal to `50,000

Name of Policyholder: _____ Landline /Mobile No _____

Correspondence Address: _____ Email Address: _____

- > Landline/Mobile number is mandatory.
- > Please provide your Email Address for future communication.

PART A - APPLICATION FOR PREMIUM RE-DIRECTION AND TOP-UP PREMIUM:-

PREMIUM RE-DIRECTION & TOP-UP PREMIUM:

NAME OF FUND	PREMIUM RE-DIRECTION [Please refer to Note 3 (i)] <input type="checkbox"/> (%) For Due Date	SINGLE TOP-UP PREMIUM* <input type="checkbox"/> (%)	SINGLE TOP-UP PREMIUM DETAILS : [Please refer to Note 4 (ix) to (xiv)] Total Top-up Amount: ` _____	
	D D / M M / Y Y Y Y		Product	Insured Age at Issuance & TOP-UP PREMIUM multiple
Large Cap Equity Fund (TLC) (ULIF 017 07/01/08 TLC 110)				
Whole Life Mid Cap Equity Fund (WLE) (ULIF 009 04/01/07 WLE 110)				
Super Select Equity Fund (TSS) (ULIF 035 16/10/09 TSS 110)				
Whole Life Aggressive Growth Fund (WLA) (ULIF 010 04/01/07 WLA 110)				
Whole Life Stable Growth Fund (WLS) (ULIF 011 04/01/07 WLS 110)				
Whole Life Income Fund (WLI) (ULIF 012 04/01/07 WLI 110)				
Whole Life Short Term Fixed Income Fund (WLF) (ULIF 013 04/01/07 WLF 110)				
TOTAL	100%	100%		

Product	Insured Age at Issuance & TOP-UP PREMIUM multiple	
	<45	>=45
Tata AIA Life Lakshya Supreme	1.25, 2.5, 5 times	1.10, 2.5, 5 times
Tata AIA Life InvestAssure Flexi Supreme		
Tata AIA Life Insurance United Ujjwal Bhawishya Supreme		
Tata AIA Life Insurance InvestAssure Gold Supreme		
Tata AIA Life Insurance InvestAssure Maximizer	1.25, 2.5, 5, 10 times	1.10, 2.5, 5, 10 times
Tata AIA Life Insurance Gyan Kosh		
Tata AIA Life InvestAssure Plus Supreme	1.25 times	1.10 times
Tata AIA Life Insurance Swarna Pratigya	NA	1.10 times

Top up Premium Multiple : _____
Top-up Sum Assured: ` _____

- NOTE:**
- Please specify percentages in whole numbers. The total Fund allocation for each option must add up to 100%.
 - Premium Re-direction:**
 - Premium Re-direction is applicable only for Policies with Regular Premium mode of payment. It redirects the future premiums into the desired Fund(s) but does not switch the existing units.
 - Change in premium re-direction will be effected only on the next premium due date. There is no premium redirection charge.
 - Premium Re-direction is not available if Systematic Money Allocation & Regular Transfer (SMART) OR Automatic Asset Allocation (AAA) option is exercised.
 - In Tata AIA Life Insurance United Ujjwal Bhawishya Supreme and Tata AIA Life Insurance Gyan Kosh products, premium redirection is not allowed after the death of the insured.
 - Single TOP-UP PREMIUM:**
 - In case Single Top-up is applied for along with the Application form, the Top-up will get the applicable NAV after the policy is issued and the TOP-UP PREMIUM Cheque is received (for local cheque) / realized (for outstation cheque).
 - Single Premium Top-up is allowed any time during the policy term except during the last five years, provided the policy is in force & there is a lock in period of 5 year from the date of acceptance of TOP-UP PREMIUM.
 - The minimum Single TOP-UP PREMIUM allowed is Rs 5,000/- and will be allowed a maximum of 4 times a policy year.
 - For all Single TOP-UP PREMIUMS, Policyholder will have to take additional sum assured equal to TOP-UP PREMIUM Multiple times Single TOP-UP PREMIUM, subject to underwriting.
 - Single TOP-UP PREMIUM may be allocated in any proportion as required (i.e it may be different from the allocation of the Regular/Single Premium).
 - As per the IRDA regulations the Top up request should be accompanied by Photo Identity & Address Proof (utility bills within 6 months) and where the total Annual premium amount (including Top up amount) is equal to or greater than ` 1,00,000/- then the request in addition to the above should also be accompanied by appropriate Income Proof. These documents would be collected only if they are not collected earlier during the year.
 - Tax benefits are as per the Income Tax Act, 1961, and are subject to modifications made thereto from time to time.
 - In Tata AIA Life Insurance United Ujjwal Bhawishya Supreme and Tata AIA Life Insurance Gyan Kosh products, Single top up will not be allowed during the disability benefit period and after the death of the insured.
 - All taxes, duties, surcharge, cesses or levies, (including but not limited to Service Tax and TDS), as may be imposed by Government or any statutory authority from time to time, on the premiums payable and benefits secured under Policy, shall be borne and paid by the Policyholder.

PART B - APPLICATION FOR SYSTEMATIC MONEY ALLOCATION & REGULAR TRANSFER (SMART) OPTION - ONLY FOR ANNUAL & SINGLE PREMIUM PAYMENT MODE:-

SMART OPTION: Active Deactivate

Choose Accumulation and Target Fund (Fund available for Investment)	Accumulation Fund (Choose any one Fund)	Target Fund (Choose any one Fund other than chosen Accumulation Fund)
Large Cap Equity Fund (TLC)		
Whole Life Mid Cap Equity Fund (WLE)		
Super Select Equity Fund (TSS)		
Whole Life Aggressive Growth Fund (WLA)		
Whole Life Stable Growth Fund (WLS)		
Whole Life Income Fund (WLI)		
Whole Life Short Term Fixed Income Fund (WLF)		
Total	100%	100%

- NOTE**
- In this option the Switch would be effected only from Regular/Single Premium Account at policy inception or on any policy anniversary provided the policy is in force.
 - Please submit your request 30 days in advance of your policy anniversary.
 - The automatic Fund switches in the SMART option is available out of the 12 free switches.
 - SMART Option can be stopped at any point of time and SMART is free of any charge.
 - Manual Fund switching for Funds on which SMART option is active is not allowed. However Manual Fund switching would be available on other Regular/Single Premium Funds and Top up Premium Funds, at applicable charges
 - SMART will not be available during Discontinuance of premium / Automatic Asset Allocation option is chosen.
 - SMART option is not available with Tata AIG Life Insurance United Ujjwal Bhawishya Supreme product.

In respect of premiums received on or before 3.00 pm by the company along with a local cheque or demand draft payable at par at the place where the premium is received, the closing NAV of the day on which premium is received shall be applicable. Kindly note that in case of local cheque/demand draft is submitted through any other indirect methods, the applicable NAV is decided based on the day the intimation is received by the insurer. If the intimation is received on Saturday, Sunday, Public Holiday or after 3.00 pm, NAV of the next day will be applicable.

Tata AIA Life Insurance Company Ltd. (IRDA of India Regn. No. 110) (CIN - U66010MH2000PLC128403)

Registered & Corporate Office: 14th Floor, Tower A, Peninsula Business Park, Senapati Bapat Marg, Lower Parel, Mumbai 400013

For more Information, contact your advisor or call on our Helpline No 1-860-266-9966 (local charges apply) or SMS "Service" to 58888 or e-mail us at customer-care@tataaia.com or visit our website www.tataaia.com

This product is underwritten by Tata AIA Life Insurance Company Ltd.

Policy No. - U

PART C – APPLICATION FOR SWITCH:-

SECTION - I] SWITCH TO BE EFFECTED FROM: Regular/Single Premium Account Top-up Account

SWITCH FROM EXISTING FUND(S) [Tick on the Fund(s) from which switch is required]		Provide amount or units or % of units to be switched from the existing Fund	SWITCH TO DESIRED FUND(S) [Mention the break up of units provided in B that are to be switched from the existing Fund to the desired Fund(s)]							
			Large Cap Equity Fund	Whole Life Mid Cap Equity Fund	Super Select Equity Fund	Whole Life Aggressive Growth Fund	Whole Life Stable Growth Fund	Whole Life Income Fund	Whole Life Short Term Fixed Income Fund	The row total (C+D+E+F+G+H+I) should be equal to 100%
Cell	(A)	(B)	(C)	(D)	(E)	(F)	(G)	(H)	(I)	(J)
1	Large Cap Equity Fund (TLC)									100%
2	Whole Life Mid Cap Equity Fund (WLE)									100%
3	Super Select Equity Fund (TSS)									100%
4	Whole Life Aggressive Growth Fund (WLA)									100%
5	Whole Life Stable Growth Fund (WLS)									100%
6	Whole Life Income Fund (WLI)									100%
7	Whole Life Short Term Fixed Income Fund (WLF)									100%

- NOTE:**
- Please specify percentage in whole numbers & please do not fill any details in the shaded (black) cells.
 - If all the units are to be switched from the existing Fund, mention 100% in column B.
 - Switch will not change the Policy's Regular Premium Allocation & Switch is not allowed in lapsed policy.
 - 12 free Switches will be allowed in a policy year.
 - If the account from which the Switch is to be effected is not specified in Section I, the Switch will automatically be effected from both the Accounts.
 - If the amount or the number of units or the percentage of units is not specified in column B, all the existing units from that Fund would be switched to the desired Fund(s).
 - Fund Switching is not available for the Funds (Accumulation Fund and Target Fund) in which SMART is active or on those Funds in which AAA is active
 - Fund switching is not allowed in Tata AIG Life Insurance United Ujjwal Bhawishya Supreme and Tata AIG Life Insurance Gyan Kosh products after the death of the insured.

PART D – APPLICATION FOR AUTOMATIC ASSET ALLOCATION (AAA) OPTION

SECTION - I] REQUEST TO ACTIVATE AUTOMATIC ASSET ALLOCATION OPTION: Regular/Single Premium Account Top-up Account

SECTION - II] REQUEST TO DE-ACTIVATE AUTOMATIC ASSET ALLOCATION OPTION: Regular/Single Premium Account Top-up Account

- NOTE:**
- Automatic Asset Allocation can be availed at the option of the policyholder, exercisable at policy inception or on any policy anniversary and is free of any charge.
 - Request to start the Automatic Asset Allocation should be received 30 days in advance of the policy anniversary.
 - The policyholder can opt out of this option any time during the term and opt for it again
 - When AAA is opted, the allocated premium is distributed between two Funds Large Cap Equity Fund and Whole Life Income Fund based on the policyholders age.
 - Policyholders investments will be systematically transferred from Large Cap Equity Fund and Whole Life Income Fund in 10 installments during the last 10 policy quarterly anniversaries of the policy
 - Every Policy Quarterly Anniversary, the investments in the two Funds will be rebalanced based on the current age as on the quarterly policy anniversary and the Fund allocation percentage for that age band
 - SMART will not be available if AAA option is chosen
 - Manual Fund switching for Regular/Single Premium Funds and Top-up Funds (if any), on which AAA is active, is not allowed. Manual Fund switching is allowed on other available Funds at applicable charges.
 - AAA option is not available with Tata AIG Life Insurance United Ujjwal Bhawishya Supreme product.

DECLARATION AND AUTHORISATION TO PART A, B, C & D.

I/We understand that ULIP products are different from traditional Life Insurance products and are subject to risk factors. I/We also understand that premiums paid in ULIP are subject to investment risks associated with capital Markets & the NAV of the units may go up or down based on the performance of the Fund and factors influencing capital markets & the insured are responsible for their decision(s). Investments are subject to market risk and Past performance is not indicative of future results.
 I/We accept the risks associated with premium allocation / re-direction selected by me/us during the term of the policy and/or the switch of Funds inter se. I/We also confirm that my/our decision is purely on the basis of my/our own merits / discretion.
 I/We also agree that the Company is not responsible for guaranteeing the resultant returns from "Premium Re-direction", "Switch", "Single top-up", "SMART" & "AAA" based on instructions issued by me/us, and that such returns shall depend on the performance of the Fund/s selected by me/us.
 I/We understand that (i) the Company may be unable to process this application, if, I/We fail to provide any material information as requested upon by the Company.
 I/We understand and agree that, the said request shall be treated as valid on acceptance by the Company with proper branch, date and time stamp.
 I/We request that this policy be changed in accordance with the above particulars and a copy of the said request shall be attached to and form a part of the said policy.
 I/We understand and agree for transactions involving debit/credit of units, the value of said units shall be determined in accordance with the provisions of the said policy on the valuation date, immediately following receipt of this request.

Signature of Insured

/ /
DD/MM/YYYY

Signature of Policyholder/Assignee/Trustee (if other than insured)

/ /
DD/MM/YYYY

Signature of Witness

/ /
DD/MM/YYYY

PLACE: - _____

DECLARATION IN CASE THE LIFE INSURED / POLICYHOLDER IS ILLITERATE OR SIGNING IN VERNACULAR:
 I, _____ (name) with _____ (identify type) _____ (identity number) hereby declare that I have explained the contents of the Request for Change Form to the Life Insured / Policyholder in _____ language and that the Life Insured / Policyholder has signed / affixed his/her thumb impression on the Request for Change Form after fully understanding the contents thereof.

Signature of the witness _____ **Signature/ Thumb impression of Insured/Policyholder** _____

- NOTE:**
- All signatures must be in blue ink. Names should be written as they appear in our record.
 - The witness has to be 21 years old and above, who is not the beneficiary of this policy.

CUSTOMER ACKNOWLEDGEMENT COPY

Policy No. - U Premium Redirection Fund Switch AAA SMART Single Top-up

Branch Name, Date, Time Stamp

Tata AIA Life Insurance Company Ltd. (IRDA of India Regn. No. 110) (CIN - U66010MH2000PLC128403)

Registered & Corporate Office: 14th Floor, Tower A, Peninsula Business Park, Senapati Bapat Marg, Lower Parel, Mumbai 400013

For more Information, contact your advisor or call on our Helpline No 1-860-266-9966 (local charges apply) or SMS "Service" to 58888 or e-mail us at customercare@tataaia.com or visit our website www.tataaia.com

This product is underwritten by Tata AIA Life Insurance Company Ltd.

L&C/Misc/2016/Jul/336

Version 5.2

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