

To help us serve you better, kindly ensure that the form is completely filled  
(This Insurance does not commence until the proposal is accepted and premium is realized by Tata AIG General Insurance Company Limited)

POS PAN No.\* \_\_\_\_\_  
(Mandatory for POS Agent)

Proposal Number \_\_\_\_\_

### PERSONAL DETAILS

Name \_\_\_\_\_

Address \_\_\_\_\_

City \_\_\_\_\_

State \_\_\_\_\_

PIN \_\_\_\_\_

Phone (0) \_\_\_\_\_ (R) \_\_\_\_\_

Fax \_\_\_\_\_ Mobile \_\_\_\_\_

E-mail \_\_\_\_\_

Personal Information  
(Please tick where applicable)

Date of birth         Sex Male ☐ Female ☐ Marital status Married ☐ Single ☐

Occupation Service ☐ Self employed ☐ Nature of Occupation \_\_\_\_\_

Nominee's Name\* \_\_\_\_\_

Relationship \_\_\_\_\_

\*If the Nominee is minor, Name and Address of Appointee and Relationship with Minor:

Appointee Name	Relationship	Address of the Appointee
_____	_____	_____

Nominee should be an immediate relative of the insured

### Policy Details (please encircle below)

Silver Plan		Payout Period (Months)			
		60	120	180	240
Benefit per month (Rs.)	Annual Premium Amount (Rs.)				
	10000	966 <input type="checkbox"/>	1,840 <input type="checkbox"/>	2,692 <input type="checkbox"/>	3,540 <input type="checkbox"/>
	15000	1,379 <input type="checkbox"/>	2,692 <input type="checkbox"/>	3,965 <input type="checkbox"/>	5,338 <input type="checkbox"/>
	20000	1,840 <input type="checkbox"/>	3,540 <input type="checkbox"/>	5,338 <input type="checkbox"/>	7,071 <input type="checkbox"/>

Gold Plan		Payout Period (Months)			
		60	120	180	240
Benefit per month (Rs.)	Annual Premium Amount (Rs.)				
	25000	2,336 <input type="checkbox"/>	4,460 <input type="checkbox"/>	6,707 <input type="checkbox"/>	9,081 <input type="checkbox"/>
	30000	2,762 <input type="checkbox"/>	5,408 <input type="checkbox"/>	8,194 <input type="checkbox"/>	11,349 <input type="checkbox"/>
	35000	3,185 <input type="checkbox"/>	6,275 <input type="checkbox"/>	9,742 <input type="checkbox"/>	13,435 <input type="checkbox"/>

Premium chart (inclusive of 18% GST)

Policy Period : From         To

Premium Amount - Rs. \_\_\_\_\_ Plan ☐ Silver ☐ Gold

Payout Period   months. Benefit Per Month Rs.

### Additional Details

- Whether you are suffering/met with any illness/disability in the last 5 years : Yes ☐ No ☐  
If Yes, provide details : \_\_\_\_\_
- Whether you have taken any personal accident policy. Yes ☐ No ☐  
If yes whether from ☐ Tata AIG General Insurance Company Limited ☐ Other (Please Specify Name) \_\_\_\_\_  
Policy Number \_\_\_\_\_ Other details: \_\_\_\_\_
- I hereby declare that my Gross Annual Income is (Rs '000): Rs. \_\_\_\_\_ and understand that the Sum Insured opted for will not be greater than 10 times/20 times Gross Annual Income as applicable. (see overleaf for details)

Max Sum Insured opted can be -

- i) in case of Salaried Person - Max 10 times of Income (as appearing in Form 16 / Salary slip/ IT acknowledgement)  
ii) in case of Self-Employed Person - Max 20 times of Income (as appearing in IT acknowledgement/ Audited P&L)

#### Payment Details

Payment Mode : ☐ Cheque ☐ DD ☐ Cash ☐ Credit Card (only Visa/ Master Card accepted)

Cheque / DD No.

Date

Bank Name

Branch

(Please make a Crossed Cheque/DD in favour of 'Tata AIG General Insurance Company Limited' only)

Credit Card No.

Expiry Date

PAN Card No.  In the absence of PAN Card, please give details of any other authorized Photo ID

Photo ID Type

Sources of funds ☐ Salary ☐ Business ☐ Other (Please specify) \_\_\_\_\_

#### DECLARATION & WARRANTY ON BEHALF OF ALL PERSONS PROPOSED TO BE INSURED -

- ☐ I/We hereby declare, on my behalf and on behalf of all persons proposed to be insured that the above statements, answers and/or particulars given by me are true and complete in all respects to the best of my knowledge and that I/We am/ are authorized to propose on behalf of these other persons.
- ☐ I understand that the information provided by me will form the basis of insurance policy, is subject to the Board approved underwriting policy of the Insurance company and that the policy will come into force only after full receipt of the premium chargeable.
- ☐ I/We further declare that I/We will notify in writing any change occurring in the occupation or general health of the life to be insured/ proposer after the proposal has been submitted but before communication of the risk acceptance by the company.
- ☐ I/We declare and consent to the company seeking medical information from any hospital who at anytime has attended on the life to be insured/ proposer or from any past or present employer concerning anything which affects the physical and mental health of the life to be assured/proposer and seeking information from any insurance company to which an application for insurance on the life to be assured/ proposer has been made for the purpose of underwriting the proposal and/or claim settlement.
- ☐ I/We authorize the company to share information pertaining to my proposal including the medical records for the sole purpose of proposal underwriting and/or claims settlement and with any Governmental and/or Regulatory Authority.
- ☐ I authorize Tata AIG General Insurance Company Limited and associate partners to contact me via e-mail, phone or SMS.

Date:

Place: \_\_\_\_\_

Signature of the Proposer

#### AML guidelines:

1. I/we hereby confirm that all premiums paid / payable in future will be from bonafide sources and not paid out of proceeds of crime and that such premiums are not disproportionate to my/our income. I / we understand that the Company has the right to call for documents to establish sources of funds and to cancel the insurance policy in case I / we are found guilty by any competent court of law under any of the statutes, directly or indirectly governing the prevention of money laundering law in India.
2. I / we are not Politically Exposed Persons \* nor are their close relatives / family members / associates . I / we shall keep the company informed if we subsequently become a Politically Exposed Person / close relative / family member / associate of Politically Exposed Persons.

"Politically Exposed Persons" shall have the meaning assigned to it under Prevention of Money-Laundering (Maintenance of Records) Amendment Rules, 2023 as amended from time to time.

● **Nationality :** Indian ☐ Non-Indian ☐ If Non-Indian, please specify the Country : \_\_\_\_\_

#### ● Type of Organization

Corporations ☐ Governments ☐ Non Governmental Organizations ☐ Society ☐  
Trust ☐ Partnership ☐ International Organization ☐ Cooperatives ☐ Section 25 Company ☐

PAN Card No.  in the absence of PAN Card, please give details of any other authorized Photo ID

Card Type \_\_\_\_\_

Number:

Sources of funds ☐ salary ☐ Business ☐ Other (Please specify) \_\_\_\_\_

**Additional Information:** (If there is insufficient space to provide additional relevant information, whether as requested or otherwise, please attach extra sheet duly signed.)

#### Declaration

The content of this form along with product benefits, terms/conditions and exclusions have been clearly explained to me. I/we have understood these and confirm to abide by the policy terms & conditions.

Signature of the Proposer: \_\_\_\_\_

Name & Signature of agent/intermediary: \_\_\_\_\_

Code \_\_\_\_\_

#### Vernacular Declaration (Certification in case the proposer has signed in vernacular/thumb print):

The content of this form along with product benefits, terms/conditions and exclusions have been clearly explained by me in vernacular to the proposer who has understood and confirmed the same.

Signature/Thumb impression of the Proposer: \_\_\_\_\_

Name & Signature of agent/intermediary: \_\_\_\_\_

Agent Declaration:

I, \_\_\_\_\_ (Full Name) in my capacity as an Insurance Advisor/ Specified Person of the Corporate Agent/Authorized employee of the Broker/Relationship Officer, do hereby declare that I have explained all the contents of this Proposal Form, including the nature of the questions contained in this Proposal Form to the Proposer including statement(s), information and response(s) submitted by him/her in this Proposal Form to questions contained herein or any details sought herein will form the basis of the Contract of Insurance between the Company and the Proposer, if this Proposal is accepted by the Company for issuance of the Policy. I have further explained that if any untrue statement(s)/ information/response(s) is/are contained in this Proposal Form/including addendum(s), affidavits, statements, submissions, furnished/to be furnished, the Company shall have the right to vary the benefits which may be payable and further more if there has been a nondisclosure of any material fact, the policy issued to his/her favor pursuant to this Proposal may be treated by the Company as null and void and all premiums paid under the Policy may be forfeited to the company.

License No.(Intermediary/Corporate Agent/Broker/Relationship Officer) \_\_\_\_\_

Name of the specified Person and code \_\_\_\_\_

Place: \_\_\_\_\_

Date: \_\_\_\_\_

Signature of Agent

Bank Details

As per the Regulatory requirements ,we can effect payment of refund I claims only through Electronic Clearing System (ECS) / National Electronic Funds Transfer (NEFT) / Real Time Gross Settlement (RTGS) / Interbank Mobile Payment Service (IMPS). For this purpose please submitthe following details of the insured's bank account#

Name of the Account Holder: \_\_\_\_\_

Name of the Bank: \_\_\_\_\_ Branch: \_\_\_\_\_

Type of Account : ☐ SB Account ☐ Current Account Others (please specify) \_\_\_\_\_

Account Number : \_\_\_\_\_

IFSC Code of Bank : \_\_\_\_\_

If the premium cheque is not paid from the above mentioned account then a cancelled cheque leaf of the above mentioned account is to be attached.  
#mandatory if annualized premium is more than Rs.10,000

Specified Person Details

SP Certificate No	SP Name	SP Signature
_____	_____	_____



**Prohibition of Rebates - Section 41 of the Insurance Act, 1938 as amended by Insurance Laws (Amendment) Act, 2015**

1. 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 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 prospectus of the insurer.

2. Any person making default in complying with the provisions of this section shall be liable for penalty which may extend to ten lakh rupees.

**Disclaimer:** Insurance is the subject matter of the solicitation. For more details on risk factors, terms and conditions, please read sales brochure carefully, before concluding a sale.

**Section 64 VB of the Insurance Act 1938:** Commencement of risk cover under the policy is subject to receipt of premium by TATA AIG General Insurance Company Limited.

**TATA AIG General Insurance Company Limited**

Registered Office: Peninsula Business Park, Tower A, 15th Floor, G.K. Marg, Lower Parel, Mumbai - 400013

Toll Free No: 1800 266 7780 | Email: customersupport@tataaig.com | Website: www.tataaig.com

IRDA of India Registration No: 108 | CIN:U85110MH2000PLC128425 | Ver: TA/RPA/V1.3/Oct22

**ACKNOWLEDGMENT SLIP**

Proposal form received from:

Mr./Mrs./Ms.....

Address:.....

..... Premium Amount: Rs ..... to be debited from Account of

Mr/ Ms .....

Account Holder Number ..... Bank Name .....

Cheque No.: ..... Date ..... Branch .....

"Commencement of risk cover under the policy is subject to receipt and realization of payable premium by Tata AIG General Insurance Company Limited"