

Checklist for Fund Transfer Surrender

FT Documents: RHO	
NRI / NON-NRI Country of Residence:	
Surrender refund request received on Date	
Surrender Policy Number (s) :	
Name of Policy holder :	
New Proposal Number :	
Name of New Proposer with Relationship	
Premium Amount :	
Check Points :	
Customer Walk-In (For "walk-in waiver" approval from competent authors	ority is required & OPD is mandatory) Yes/ No
2. Consent for Fund Transfer received	Yes/ No
3. Signature verification done	Yes/ No
4. OPD	Yes/ No
5. KYC documents of the proposer / life assured received	Yes/ No
6. DC mandate form	Yes/ No
7. Bank account proof	Yes/ No
Duly filled proposal form received	Yes/ No
9. RD's approval is enclosed	Yes/ No
10. Fund Transfer to new proposal in favour of	SELF / SPOUSE / CHILD
If answer to any of the above mentioned questions is "No" or blank then Fund	Transfer will be rejected
FT Calling Remark (Please tick) : Positive Neg	ative
Calling done on : Tel / Mobile No.	ontime
Date: D D M M Y Y Y Y	PC
Signature of the Official:	
Name of the Official:	
Employee Code:	Designation (RM-OCR/RPS-Head / HPC Head)
Note : Checklist for fund transfer cases is to verified and attested	by RM-OCRH/ RPS Head / HPC Head only.

SBI Life Insurance Company Limited: Registered and Corporate Office: Natraj, M.V. Road & Western Express Highway Junction, Andheri(East), Mumbai- 400 069. Tel.: (022) 61910000. Central Processing Center: 7th Level (D-Wing) & 8th Level, Seawoods Grand Central, Tower 2, Plot No. R-1, Sector-40, Seawoods, Nerul Node, Navi Mumbai- 400 706. Tel.: (022) 66456000. IRDAI Registration No. 111. CIN: L99999MH2000PLC129113. Toll Free No. 1800 22 9090 (From 9.00am to 9.00pm). Visit: www.sbilife.co.in E-mail: info@sbilife.co.in