

CHECKLIST FOR MATURITY TO FUND TRANSFER

(To be used for cases where Maturity Amount is to be transferred to a New Proposal)

| Maturity documents received Date D D M M Y Y Y Y | |
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| Maturity Policy Number (/s) | |
| Name of Policy holder Image: Sector and the sector and t | |
| New Proposal Number (/s) | |
| Name of New Proposer | |
| Premium Amount ₹ | |
| Policyholder's contact number | |
| Check points: | |
| 1. Consent for Fund Transfer received | Yes No |
| 2. Is the existing Policy Holder and Proposer for New Proposal same | Yes No |
| 3. If reply to Q 2 is "No", then please confirm the relationship of New | |
| Proposer with the existing policyholder Spot | use Children Others |
| 4. Original Policy Document is received | Yes No |
| 5. If OPD is not received, the process for IB cases is completed | Yes No |
| 6. Fully filled proposal form received | Yes No |
| 7. Signature verification done and matched | Yes No |
| 8. KYC documents of life assured received and matched with our database | Yes No |
| 9. Is the New proposal under the same distribution channel | Yes No |
| If reply to Q 9 is "No", then please get the requisite approval from RD | |
| (Please do not recommend cases where reply to Question no 3 is 'Others' and replies to all other question except Q no 2, 4 | |
| and 9 is 'NO') | |
| FT calling Details – Date D M Y Y Y Time: Contact No | |
| Remarks for Negative: | |
| | |
| Date: D D M M Y Y Y Y | Not Recommended |
| PC Name: | |
| | |
| Name of the official: | |
| Designation: PC Head / Dy. PC Head | Signature of PC Head / Dy. PC Head |
| | |
| Recommendation of RD: | |
| In case the New Proposal is sourced under Different Channel | |
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| | |

Signature of RD

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 267 9090 (From 9.00am to 9.00pm). Visit: www.sbilife.co.in E-mail: info@sbilife.co.in