

Group Surrender check list

1) Distribution Channel

- ☐ Institutional alliances
☐ Banc assurance

2) Master Policy Holder Name :

3) Master Policy No :

4) Surrender Request Inward Date:

Sr.No	Items to be checked	Yes/ No	Received Date	Remarks if any
1	Surrender request in stipulated format duly filled and signed			
2	Cancelled cheque leaf with name printed / Copy of pass book			
3	Original certificate of insurance / Letter from customer if COI not received			
4	Whether Signature is attested by banker along with bankers Certification			
5	Checks whether minimum of 3 full years premium received from the customer and 3 completed years, (If not reject the same)			

Prepared By

Checked By

Name:
 Designation:

Name:
 Designation:

Date:

PC Name:-

For CPC USE

CPC Inward Date:-

Scrutinised:- YES/NO

Surrender Value :- Rs.

Processed Date :-

Prepared By
 Name :-
 Designation:

Checked By
 Name:
 Designation: