

# FUND SWITCH & PREMIUM REDIRECTION FORM



Edelweiss Tokio Life Insurance Company Limited | IRDAI Regn. No. : 147 | CIN: U66010MH2009PLC197336  
Registered Office: 6th Floor, Tower 3, Wing 'B', Kohinoor City, Kirol Road, Kurla (W), Mumbai 400070

Policy No.:             E Date:

Name of the Policy Holder: \_\_\_\_\_ Tel. No.: \_\_\_\_\_

Fund Switch (It will be applicable to existing funds only & not on future allocations)		
Percentage	From (Name of the Fund)	To (Name of the Fund)

Premium Redirection (It will be applicable to future allocations only & not on existing funds)	
Fund Name	New %
Equity Large Cap Fund (SFIN:ULIF00118/08/11EQLARGECAP147)	
Equity Top 250 Fund (SFIN:ULIF0027/07/11EQTOP250147)	
Bond Fund (SFIN:ULIF00317/08/11BONDFUND147)	
Money Market Fund (SFIN:ULIF00425/08/11MONEYMARKET147)	
Price Earning Based Fund (SFIN:ULIF00526/08/11PEBASED147)	
Managed Fund (SFIN:ULIF00618/08/11MANAGED147)	
Equity Mid Cap Fund (SFIN:ULIF001107/10/16ETLIMIDCAP147)	
<b>Total</b>	<b>100</b>

## General Instructions

- Availability of Investment Funds differ from product to product. Please refer product brochure/policy contract for details.
- Switching and premium redirection is not allowed under Systematic Transfer Plan (option available only with Wealth Ultima). However, the Policyholder may (opt in/opt out) of this option anytime during the Policy Term.
- If the Policy has been assigned, all policy servicing requests would be accepted only from the Assignee.
- Premiums for Unit Linked Products received up to 3:00 pm IST on a business day (Mon-Fri), the closing NAV of the same day will be applicable. However, if the application is received after 3:00 pm IST, then the closing NAV of the next business day shall be applicable.
- Free switches cannot be carried forward to the next policy year if not used.
- Switch amount is subject to the minimum switch amount as mentioned in the policy contract.
- Once opted for Switch option or Premium Redirection, the same cannot be reversed.
- Premium Redirection is applicable to the future base premiums as well as top-up premiums, but will not affect the existing units or fund value .
- Notice for premium redirection in writing to be given at least 2 weeks prior to the due date of the next premium.
- Switch/Redirection Charges (if any) beyond the number of free switches/redirection as mentioned in the policy contract, will be charged by debiting the same from the amount to be switched. This varies from product to product.

I hereby declare that I have understood the above points & fees/charges applicable for switch & redirection as stated in Terms & Conditions in the Policy document.

**For Branch Office Use**

Branch Name: \_\_\_\_\_

Staff Name: \_\_\_\_\_

Staff Sign: \_\_\_\_\_

Date: \_\_\_\_\_ Time: \_\_\_\_\_ a.m./p.m.

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

Signature of the Policy Holder

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

Apr\_2018/Ver 6

## Acknowledgement Slip

Received a request for Fund Switch/Premium Redirection for policy no.: \_\_\_\_\_ on             at \_\_\_\_\_ a.m/p.m.



Corporate Office:  
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Stamp/ Seal of the Branch