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.: D M Y <th< th=""></th<>						
Name of the Policy Holder: Tel. No.:						
Fund Switch (It will be applicable to existing funds only & not on future allocations)			Premium Redirection (It will be applicable to future allocations only & not on existing funds)			
Percentage	From (Name of the Fund)	To (Name of the Fund)	Percentage	Fund Name	New %	
				Equity Large Cap Fund (SFIN:ULIF00118/08/11EQLARGECAP147)		
				Equity Top 250 Fund (SFIN:ULIF0027/07/11EQT0P250147)		
				Bond Fund (SFIN:ULIF00317/08/11BONDFUND147)		
				Money Market Fund (SFIN:ULIF00425/08/11MONEYMARKET147)		
				PE Based Fund (SFIN:ULIF00526/08/11PEBASED147)		
				Managed Fund (SFIN:ULIF00618/08/11MANAGED147)		
				Equity Mid Cap Fund (SFIN:ULIF001107/10/16ETLIMIDCAP147)		
				Equity Blue Chip Fund (SFIN: ULIF01226/11/18ETLBLUCHIP147)		
				GILT Fund (SFIN: ULIF01326/11/18ETLGILTFND147)		
				Long Term Bond Fund (SFIN: ULIF01426/06/20ETLLNGTERM147)		
				Total	100	
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. •
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- 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.
- If request for Fund Switch and Premium Redirection received in one service form, Fund switch will be processed first and then Premium Redirection.

I hereby declare that I have understood the above points & fees/charges a	pplicable for switch & redirection as stated	in Terms & Conditions in the Policy document.
For Branch Office Use	Date and Time Stamp]
Service Request No. (Fund Switch):		
Service Request No. (Premium Redirection):		Signature of the Policy Holder
Branch Name:		
Staff Name:		
Staff Sign:		Date: D M Y
Place:		Place:
*KYC document to be collected as per Service Request		

Acknowledgement Slip

Received a request for Fund Switch/Premium Redirection for policy no.: ____



Registered Office: Edelweiss Tokio Life Insurance Company Limited 6th Floor, Tower 3, Wing 'B', Kohinoor City, Kirol Road, Kurla (W), Mumbai 400070 Toll Free : 1800 212 1212 | Fax No.: +91 22 6117 7833 Email: care@edelweisstokio.in | www.edelweisstokio.in on D D M M Y Y Y At _____ a.m/p.m.

Aug_2023/Ver 7

Stamp/ Seal of the Branch