

**GENERAL INSTRUCTIONS FOR SUBSCRIBERS SEEKING TO PURCHASE ANNUITY PLAN FROM
ICICI PRUDENTIAL LIFE INSURANCE COMPANY LIMITED**

**Listed below Instructions should be followed generating premium quote, filling up application form &
documents to be enclosed**

- A) Section 1 : General Instructions to generate a Premium/Annuity Quote
- B) Section 2 : General Instructions for Filling up the Application form
- C) Section 3 : Documents to be enclosed along with the application form

Section 1: Instructions to generate a Premium/Annuity Quote

Subscribers/Authorized agents (POPs) to visit "ICICI Prudential Website" by accessing the following
Link/Path: http://www.iciciprulife.com/public/Retirement-Plans/NPS_Subscribers.htm

OR

[www.iciciprulife.com/Retirement plans/NPS Subscriber's \(Click Here\)](http://www.iciciprulife.com/Retirement%20plans/NPS%20Subscriber's%20(Click%20Here))

- A) Post accessing, above mentioned Website link/path , "**Click**" on "**Generate Premium Quote**"
- B) Subscriber will be auto - re-directed to Premium Quote page (User interface)

Name of Annuity Product: - ICICI Prudential Immediate Annuity Plan

Premium/Annuity Quote (User Interface) Page

C) Sub Section: Personal Details

- a. Please enter Personal Details (Name /Surname/Date of Birth/Gender etc)
- b. Fields to be left blank (Not to be filled)
 - i. Distance Marketing
 - ii. Is Proposer a Staff

D) Sub Section: Product Details

- a. Pls enter product details
 - i. Purchase Price : One time Lumsup Amount you will pay in order to purchase ICICI Prudential Annuity Plan
 - ii. Total Amount : Amount that would be transferred to ICICI Prudential Life Insurance (**Purchase price + Service Tax + Education cess**)
 - iii. Periodicity : Frequency of Annuity payouts to the subscriber (**Refer brochure for more details**)
 - iv. Annuity Option : Opt for anyone amongst the 5 payout options (**Refer brochure for more details**)
 - v. Annuity amount : Amount which will credited to subscriber account as per opted Annuity Plan

- E) Sub Section: Please Enter Additional Fields for Login Assistant (To be filled up by Advisors/FSCs/UMs)
- a. Entire Section to be kept Blank (None of field needs to be data entered/selected by Subscriber)
 - b. Pls leave the **"ENTIRE"** section blank.
- F) **"Click"** on generate EBI (Button) – Electronic benefit illustration & take a printout for subscriber signature
- i. Fields to be kept blank (Not to be filled)
 1. Marketing Official signature
 2. Company Seal
- H) Ensure that **All pages of EBI Printouts are signed** by subscriber & Attached along with Application form.

Section 2: Instructions for filling up application form

Subscribers/Authorized agents (POP's) to visit ICICI Prudential website by accessing the following

Link/Path: http://www.icicprulife.com/public/Retirement-Plans/NPS_Subscribers.htm

OR

[www.icicprulife.com/Retirement plans/NPS Subscriber's \(Click Here\)](http://www.icicprulife.com/Retirement%20plans/NPS%20Subscriber's%20(Click%20Here))

- A) Post accessing , above mentioned Link/Path , **"Click"** on Download Application form
- B) Take Printout of the application form
- C) **General Instructions**
 - a. All the columns in the forms should be filled with black ink pen without any overwriting
 - b. Pls enter your PRAN (Permanent Retirement Account Number)
 - i. Field Name : OPP ID (Top –Right of the application form)
 - c. Fields that needs to be left blank (not to be filled)
 - i. Application form Page no 1
 1. **Agent Details** (Middle –Top of application form)
 - a. Bank/Branch/Source
 - b. FSM/FSC Code/Advisor/FSC Name
 - c. LIM/CSR Code
 - d. Bank A/C
 2. Receipt No
 3. Client No
 4. Proposal No
 5. Cafos Code
 6. Name as you want on the Annuity Card.
 - ii. Application form Page no 2
 1. **Particulars of plan applied for** (Point no 23)
 - a. Sub point no 2
 - i. Mode of premium Payment
 - ii. Cheque/DD No
 - iii. Cheque/DD Date

- b. Sub point no 6
 - i. Mode of Annuity Payment (Default Electronic Payout)
- c. Sub point no 7 (Bank Details)
 - i. Bank Name
 - ii. Branch
 - iii. Bank A/c No
- d. Mandatory Fields basis subscriber opted annuity plan option/signature
 - i. Application form Page no 1
 - 1. Details of the spouse (Entire section)
 - a. Applicable only , incase of joint life plan option
 - ii Application form Page no 2
 - 2. Declaration for signing in vernacular language
 - a. Applicable only, incase of signing in vernacular language
- e. Pls enter correct communication address as well as contact details (Mobile & Telephone No.)
- f. If a Nominee is minor, then appointee/guardian details will be mandatory.

Section 3: Documents to enclosed along with the application form

Subscribers/Authorized agents (POP's) to visit ICICI Prudential website by accessing the following Link/Path: http://www.icicprulife.com/public/Retirement-Plans/NPS_Subscribers.htm
OR
[www.icicprulife.com/Retirement plans/NPS Subscriber's \(Click Here\)](http://www.icicprulife.com/Retirement plans/NPS Subscriber's (Click Here))

- A) Post accessing, above mentioned link/path , **"Click"** on "Checklist" option
- B) Take Printout of the Checklist & follow the instructions
- C) Compulsory/Mandatory Documents of subscriber/Annuitant/Proposer
 - a. **Age Proof** : List of valid age proofs – Refer Annexure **"1"**
 - b. **Identity Proof** : List of valid identity proofs – Refer Annexure **"2"**
 - c. **Address Proof** : List of valid address proofs – Refer Annexure **"3"**
 - d. **Recent Photograph**
 - e. **Signed EBI** (Electronic Benefit illustration)
 - i. Fields to be kept blank (Not to be filled)
 - 1. Marketing Official signature
 - 2. Company Seal
 - f. **Payout Mandate** (Electronic mode) along with cancelled cheque copy (Subscriber only) – required for annuity Payout (Direct transfer to subscriber bank account)

D) **Additional Mandatory documents :**

- a. Depending on Purchase price/Invested amount opted by subscriber for Annuity Plan
- i. Pan card /form 60/61 (Only if, Purchase price/Invested amount > INR 49,999)
 - ii. Income Proof (Only if, Purchase price/Invested amount > INR 99,999)
 1. Refer Annexure "3"
- b. Depending on Annuity Plan option opted by the subscriber
- i. Joint Life
 1. Joint Life (Spouse) – Age Proof

ANNEXURES (List of Valid documents)

Annexure 1 -- List of Valid Age proofs

<ul style="list-style-type: none"> • Municipal birth Certificate 	<ul style="list-style-type: none"> • Domicile Certificates
<ul style="list-style-type: none"> • Passport 	<ul style="list-style-type: none"> • Baptism Certificate
<ul style="list-style-type: none"> • Valid Driving License issued >=1 yr 	<ul style="list-style-type: none"> • Marriage Certificate issued by Church
<ul style="list-style-type: none"> • LIC policies with codes: Yes(P,S,C,F,M,B,I,J,K,L*) 	<ul style="list-style-type: none"> • Govt /PSU Employee ID cards
<ul style="list-style-type: none"> • Employer's PF statement 	<ul style="list-style-type: none"> • Central Govt Health scheme certificate for their employees
<ul style="list-style-type: none"> • Notarized Birth Certificate issued within the 1st year of birth 	<ul style="list-style-type: none"> • PAN Card*
<ul style="list-style-type: none"> • Bonafied school certificates on letter head would be accepted for students only 	<ul style="list-style-type: none"> • Student ID card from Premium schools
<ul style="list-style-type: none"> • Govt service registers extract/certificates issued by Govt. to its employees. 	<ul style="list-style-type: none"> • Gram Panchayat certificates issued >1 yr prior to login upto a TSA=5Lac for specified regions only*
<ul style="list-style-type: none"> • Certified School/ College Extract including School/ College leaving certificate/ Degree certificates / mark sheet or hall ticket or admit card issued by Educational Board (10 & 12th std) reflecting life assured's DOB* 	<ul style="list-style-type: none"> • Hospital discharge card issued at the time of delivery will be considered till 5yrs of age subject to Proposer's declaration if name of child is not present on same
<ul style="list-style-type: none"> • Employer's certificate from Govt, Semi Govt, MNC, Public Ltd, Reputed Private Ltd. Organizations only. The certificate must be on the letterhead, duly signed & stamped by the authorized signatory 	<ul style="list-style-type: none"> • Defense ID including Ex-serviceman card issued to Defense personnel/ certificate of DOB issued by commanding officer with his seal & signature on the same
<p>Note –</p> <ul style="list-style-type: none"> • LIC with code L & Pan card acceptable only upto a TSA of 15 lacs for all plans • Gram Panchayat certificates issued from following states will be considered as STD age proof - Punjab, Gujarat, Rajasthan or from any state in Peninsular region. • School leaving certificate issued within 1 year from the date of login will not be considered as a valid age proof 	

Annexure 2: List of Valid Address and Identification Proofs

<u>Address and ID Verification (any one)</u>	<u>Address Verification (any one)</u>
<ul style="list-style-type: none"> • Passport (current) • PAN Card (current) • Voter's Identity Card (current) • Driving License (current) • Letter from a recognized public authority or public servant verifying the identity of the customer, not more than 6 months old (should include a photo), e. g: Gram Panchayat • Ration Card (if with a photo) (current, and only for the person whose photo is affixed) • Ration cards (current) issued with family photograph allowed as identity proof (except where such cards are prohibited from being used as proof of identity/address).* • Letter from Employer Company, not more than 2 months old (should include a photo) • Defence Card (should include a photo, and should be current) • Ex-service men card (should include a photo, and should be current) • Any identification document issued by a State Government (should include a photo, and should be current) • Written and attested confirmation from banks regarding identity of the customer (should include a photo, not more than 6 months old) • Bank account passbook with stamped photograph to be accepted if it is from scheduled commercial banks. (not more than 6 months old) • PPF account passbook with stamped photograph to be accepted. (not more than 1 year old) • GCC permit card for Gulf countries (with photo) • Arms license (with photo) • Photo ID of Central Govt employee (with photo) • RC book (with photo) • Aadhaar (UID) ID proof (with photo) having 12 digit UID number • Domicile Certificates (with photo)¹ [Includes Domiciliary certificates issued by Sarpanch] • Job card issued by National Rural Employment Guarantee Act (NREGA) duly signed by an officer of the State Government • ICICI Bank Confirmation Certificate (not more than 6 months old) • Senior Citizen ID card • Smart card/ID card issued by defense authorities for defense canteen purposes • Membership card issued by state bar council • Acknowledgement of Aadhaar ID card indicating name, address and photograph of the applicant • Membership card issued by Medical Council of India or any state medical council, e.g. Maharashtra Medical Council, etc • Defence personnel dependent ID card 	<ul style="list-style-type: none"> • Passport (current) • Voter's identity Card (Name and DOB match) • Driving License (current) • Telephone bill (mobile, landline, wireless) (not more than 6 months old) • Bank account statement or letter from bank showing the address (not more than 6 months old) • Letter from a recognized public authority or public servant verifying the residence of the customer(not more than 6 months old) [Includes Domiciliary certificates issued by Sarpanch] • Electricity bill (not more than 6 months old) • Ration card (current) (except where such cards are prohibited from being used as proof of identity/address). • Letter from Employer Company customer not more than 2 months old • Valid lease agreement along with rent receipts (rent receipts not more than 3 months old) • Written and attested confirmation from banks regarding the residence of the customer (not more than 6 months old) • Arms license (with photo) • Photo ID of Central Govt employee (with photo) with address • RC book • Domicile Certificates² • Any information document issued by a State Government (with photo)(6 months) • Letter/declaration from the officer of armed forces. (less than 2 months) • Receipt for Property Tax paid (having address) (recent). • Aadhaar (UID) proof with address having 12 digit UID number. • Demat Statement (should not be more than 3 months old) • ICICI Bank Confirmation Certificate (not more than 6 months old) • Senior citizen's ID card • LPS Gas Slips (not more than 6 months old) • Registered lease or sale agreement of residence • Learner's Driving License with address (only printed smart cards and within the validity period) • Water bill (within 6 months) • Acknowledgment of Aadhaar ID card indicating name, address & photograph of the applicant

Note: Photograph of proposer should be matched with the family photograph available on ration card.

Annexure 2: List of Valid Address and Identification Proofs (Contd)

Note: Identity proof

1. Provisional Driving License / DL without photograph cannot be accepted
2. Any KYC document submitted by customer having stamp or attestation by authorized government body stating that "Document should not be used for any other purpose apart from intended reason" should be rejected as invalid KYC document
3. Letter from employer company – (Certificates of employers who have in place systematic procedures for recruitment along with maintenance of mandatory records of its employees are generally reliable)

Note: Address proof of relatives:

1. If the proposer does not have any address proof in his/her name, and stays with parents /spouse, then the address proof in the name of parent/spouse can be accepted along with any one of the following documents to prove the relation ship
 - i. Passport
 - ii. Marriage Certificate
 - iii. Driving license
 - iv. Ration Card
 - v. School Leaving Certificate
 - vi. SSLC/PUC/Degree Marks Card
 - vii. PAN Card
 - viii. Date of Birth Certificate (with or without child's name) wherein name of parent is stated
 - ix. Pension Payment order/Passbook
 - x. Voter ID card
 - xi. Defence Dependant Card or Discharge Book issued by Cantonment Board or Ex-Servicemen Card issued by Zilla Sainik Board or other competent authority or Pension Payment Order/Book/Card issued by Commanding Officer or other competent authority.
 - xii. Letter from Commanding Officer or Officer-in-charge of the Unit in case of Defence Personnel

(Name of the proposer and the name of father/mother/spouse as stated in the Address proof should appear in the aforesaid documents)

Exception:

Applicable to cases wherein female / house-wife (proposer) -

- a) Does not have any address proof or address proof is in maiden name, non-availability of marriage certificate AND
- b) Annual premium is less than Rs. 1,00,000/-.

For aforesaid cases, address proof in name of husband, can be accepted (Provided Husband is the nominee in the policy applied). However, For identity, proper proof in the female proposer's name should be taken (mandatory).

Annexure 3: List of Valid Income Proofs

Income Proof	Validity
• Tax assessment orders	• Previous Financial Year
• Employer's Certificate	• Not more than 2 months old
• Salary Slip signed by authorized signatory of Employer	• Not more than 2 months old
• Audited accounts	• Previous Financial Year
• CA Certificate	• Not more than 2 months old
• Agricultural Income Certificate / J-receipts / Krishi Mandi Receipt	• Not more than 1 year old
• (Applicable wherein Proposer is Agriculturist)	
• Land records and Income Assessment	• Current
• Bank cash flow statements or copy of pass book	• Should show transaction in preceding 6 months.
• Income Tax Returns	• Previous Financial Year
• Form 16	• Previous Financial Year

For any Queries, Pls call Customer Service Number on 1860 266 7766
 Call Center timings 9.00AM to 9.00PM. Monday to Saturday (Except National holidays. Local charges apply)
 OR
 Alternatively you can, E- Mail across to us at lifeline@iciciprulife.com

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