



# Life Insurance Corporation of India

(Established by the Life Insurance Corporation Act, 1956)



Form 440 (Rev. - Jan. '200')

New Jeevan Dhara - II

New Jeevan Suraksha - I

Branch Office ..... Proposal No. ....

Amount of Deposit ..... BOC No. ....

Agent's Name ..... Code No. ....

License No. .... Date of Expiry ..... Club Membership (CM/ZM/DM/BM)

Tel. No. .... D.O.'s Code No. .... D.O.'s Tel. No. ....

(All answers to be filled in legibly. Answers must be given in words. Strokes of pen or dots or dashes will be accepted as answers. ✓ Tick appropriate box wherever applicable).

1. (a) Name in full of the person proposing to purchase the Annuity .....

.....

(b) Present Address ..... (c) Permanent Address .....

.....

Tel. No. .... (e) Age

E-mail .....

2. (a) Name in full of the Annuitant, i.e. the person on whose life, annuity payments depend .....

.....

(b) Present Address ..... (c) Permanent Address .....

.....

(d) Sex : Male/Female (e) Nationality ..... (f) BOC No. & Date .....

(f) (i) Age at last birthday .....	(ii) Date of Birth .....
(iii) What proof of age is being furnished with the proposal .....	
3. Description of the Annuity :	
(a) Annuity Table No. ....	
(b) Please indicate the type of annuity (Choose only one out of five)	
(i) Annuity during the life time of the Annuitant (without any guaranteed period) ?	Yes/No
(ii) (a) Annuity for a guaranteed term of years and during subsequent life time	
of the Annuitant ?	Yes/No

- (ii) (b) (If so, state the guaranteed term in years) Yes/No
- (iii) Annuity during the life of the annuitant with return of Purchase Price on death of the annuitant Yes/No
- (iv) Life annuity with annuities increasing at 3% p.a. simple Yes/No
- (v) Joint life and last survival annuity to purchaser and his/her spouse Yes/No
- (c) Mode of Annuity instalments to be paid Yearly/Half-Yearly/ Quarterly/Monthly
- (d) Please State :

- (i) The period after which the Annuity is to vest (i) ..... Year
- (ii) Whether premiums are to be paid in (ii) .....
- (a) Mode (a) Yearly/Half-Yearly/Quarterly/Monthly/ Single

- (b) Amount of Instalment/Single Premium (b) Rs. ....
- (c) Notional Cash Option (c) Rs. ....
- (d) Term Assurance Sum Assured if any (d) Rs. ....

4. (a) If proposer and annuitant are the same :
- Nominee of the annuitant to whom benefits if any, are to be paid under the policy in case of death of the annuitant before vesting of annuity.
- (a) (i) Name : .....
- (ii) Relationship to the annuitant : .....
- (iii) Age : .....
- (iv) Address : .....
- (b) If proposer and annuitant are the different :
- Nominee to whom benefits, if any, are to be paid under the policy in case of death of the annuitant while annuity is in payment
- (a) (i) Name .....
- (ii) Relationship to the annuitant : .....
- (iii) Age : .....
- (iv) Address : .....

5. Have any Deferred Annuity policies taken by the proponent, been surrendered during the preceding three years ? If so, please furnish the following details :

Name of the Branch Office/ P & GS Unit	Policy No.	Purchase Price/Cash Option	Plan No.	Year and month of issue of policy	Year & month of surrender



# DECLARATION

I/We ..... do hereby declare that the foregoing statements and answers are true in every particulars and do agree and declare that these statements and this declaration shall be the basis of the contract of annuity between me/us and the Life Insurance Corporation of India and that if any untrue averment be contained therein the said contract shall absolutely be null and void and all moneys which shall have been paid in respect thereof shall stand forfeited to the Corporation

Dated ..... on the ..... day of ..... 20.....

Name of Witness .....

Signature of Witness .....

Occupation .....

Address .....

Signature of the Proposer  
(the person proposing to purchase the annuity)

Signature of the Annuitant

If the answers to the questions in this form and the signature are in a language other than the one in which the proposal form is printed, then the proposer should declare in his own handwriting above his own signature that all questions were explained to him and that his answers were given after fully and properly understanding the same :

In case the Proposer is illiterate :-

1. The declaration should be made by the person filling in the form

Name & Address of the Declarant .....

1. I hereby declare that I have fully explained the above questions to the proposer and I have truthfully recorded the answers given by

the Proposer : .....

Signature

2. The thumb impression of the proposer should be attested by

a person of standing whose identity can easily be established

but unconnected with the Corporation and this declaration should be

made by him.

2. I hereby declare that I have explained the contents of the proposal form to the proposer in ..... language

and that I have read out to the Proposer the answers to the questions dictated by the proposer has affixed his thumb impression to the proposal form after fully understanding the contents thereof.

Name .....

Address of the Declarant .....

Signature

## INSURANCE ACT 1938 UNDER SECTION 41

- (1) No person shall allow or offer to allow, either directly or indirectly, as an inducement to any person to take out or renew or continue an insurance in respect of any kind of risk relating to lives or property in India, any rebate of the whole or part of the commission payable or any rebate of the premium shown on the policy, nor shall any person taking out or renewing or continuing a policy accept any rebate, except such rebate as may be allowed in accordance with the published prospectuses or tables of the insurer.

Provided that acceptance by an insurance agent of commission in connection with a policy of life insurance taken out by himself on his own life shall not be deemed to be acceptance of a rebate of premium within the meaning of this subsection if at the time of such acceptance the insurance agent satisfies the prescribed conditions establishing that he is a bonafide insurance agent employed by the insurer.

- (2) Any person making default in complying with the provisions of this section shall be punishable with fine which may extend to five hundred rupees.

DECLARATION

AGENT'S REPORT

(a) Have you canvassed the Pensioner in Person ? .....

If not, state reasons therefore

(b) What is the approximate age of the Pensioner .....

in your opinion ?

(c) Do you recommend the acceptance of the .....

Proposal ?

I hereby declare that the foregoing statements are true and correct to the best of my knowledge and belief.

Further, I declare that the above proposal is secured by me and that I have fully explained the contents of the proposal form to the proposer.

Dated ..... on the ..... day of ..... 20 .....

Signature of the Agent