

APPLICATION FOR PREMIUM RE-DIRECTION

CONDITIONS TO BE READ BEFORE FILLING THE FORM:

1. This form needs to be filled by the policyholder himself/herself in BLOCK LETTERS in black or blue ink.
2. Premium Re-direction (Allocation of Future Premium) would be effective from next premium due date.
3. If Renewal Premium is received alongwith this form please co-ordinate with CSD/Policy Servicing Team at CPC to ensure renewal Premium received is invested as mentioned in this Form.
4. This application will not be effective until it is officially accepted by Kotak Mahindra Old Mutual Life Insurance Limited.
5. **Premium Re-direction will not affect the existing unit holdings.**
6. Two Financial Transaction cannot be processed on same day.

Policy No.:	<input type="text"/>	Plan Code:	<input type="text"/>
Plan Name:	<input type="text"/>	Date:	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>
Title	Surname	First name	Middle name
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Contact Details:	<input type="text"/>	Email ID:	<input type="text"/>

Do your bit for green world & Switch to e-communication. Kindly mark if you would like to receive your communication through electronic mode.

ALLOCATION OF FUTURE PREMIUM (PREMIUM RE-DIRECTION) :

Note : To Change the existing fund holdings, please fill the 'Application for Funds Switch' form.

I apply for all future premiums to be invested in proportion as follows :

Product Name/ Code	[] - Kotak Safe investment Plan II (KSI & K01) [] - Kotak Flexi Plan (KFP & K02) [] - Kotak Platinum Advantage Plan Shield A/c (K08) [] - Kotak Platinum Advantage Plus Shield A/c (K17 & K16)	To (%)	Available in
KGRG	Guaranteed Growth Fund		KSI, K01, KFP, K02, K08, K16, K17
KBLG	Guaranteed Balanced Fund		KSI, K01, KFP, K02, K08
KBDF	Dynamic Bond Fund		KSI, K01, KFP, K02, K08
KFRF	Dynamic Floating Rate Fund		KSI, K01, KFP, K02, K08
KGLF	Dynamic Gilt Fund		KSI, K01, KFP, K02, K08
FMMF	Dynamic Money Market Fund		KSI, K01, KFP, K02, K08
GRTF	Guarantee Fund		KSI & K01
FFEf	Frontline Equity Fund		KSI & K01
		100%	

- Notes : - In case of KSI and K01 'Frontline Equity Fund' is available only when the Capital Guarantee falls off.
 - In case of KSI and K01 'Guarantee Fund' is available only when the Capital Guarantee falls off.
 - Once 'Frontline Equity Fund' has been opted for, customer cannot have his Capital Guarantee reinstated at any point of time.
 - Dynamic Money Market Fund is available only in the last policy year.
 - Guarantee & Front line Equity Fund is not available for KSIP with product code KULO & Joint Life KSIP policies.
 - Kotak Platinum Adv. Plus product code K16 & K17, only Guaranteed Growth Fund is available.

Product Name/ Code	[] - Kotak Safe investment Plan II (K34) [] - Kotak Secure Invest Insurance (K41)	To (%)	Available in
FMMF	Money Market Fund		K34 & K41
FFEf	Frontline Equity Fund		K34 & K41
GRTF	Guarantee Fund		K34 & K41
		100%	

- Notes : - 'Frontline Equity Fund' is available only when the Capital Guarantee falls off.
 - Once 'Frontline Equity Fund' has been opted for, customer cannot have his Capital Guarantee reinstated at any point of time.

Product Name/ Code	[] - Kotak Priviledged Assurance (K03)	To (%)	Available in
KAPF	Advantage Plus Fund		K03
KAP2	Advantage Plus Fund II		K03
KAMF	Advantage Multiplier Fund		K03
KAM2	Advantage Multiplier Fund II		K03
		100%	

Policy No. _____ Signature of Scribe _____ Signature of Policyholder _____

Product Name/ Code	[] - Kotak Retirement Plans (unit-Linked) (K04A, K04B & K04C) [] - Kotak Secure Retirement Plan (K18)	To (%)	Available in
KGRP	Pension Growth Fund		K18
KBLP	Pension Balanced Fund		K04A, K04B, K04C, K18
KBDF	Pension Bond Fund		K04A, K04B, K04C, K18
KFRP	Pension Floating Rate Fund		K04A, K04B, K04C, K18
KGLP	Pension Gilt Fund		K04A, K04B, K04C, K18
PMMF	Pension Money Market Fund II		K04A, K04B, K04C
		100%	

Notes : - Pension Growth Fund is available only with Kotak Secure Retirement Plan (K18) and not available with Kotak Retirement Plans (K04A, K04B & K04C)
- Pension Money Market Fund II is available only in the last policy year.

Product Name/ Code	[] - Kotak Easy Growth (KEG) [] - Kotak Long Life Secure Plus and Wealth Plus (K13,K14) [] - Kotak Headstart Future Protect and Assure Wealth (K05 & K06) [] - Kotak Smart Advantage (K12) [] - Kotak Platinum Adv Plus Dynamic A/c (K08, K16 & K17) [] - Kotak Retirement Income Plan (KRI1, KRI2, KRI3)	To (%)	Available in (For Policies issued on or prior to 31st Dec 2009)
KAGF	Aggressive Growth Fund		KEG, K05, K06, K08, K13, K14, K16, K17
KGRF	Dynamic Growth Fund		KEG, K05, K06, K08, K13, K14, K16, K17
KBLF	Dynamic Balanced Fund		KEG, K05, K06, K08, K13, K14, K16, K17, KRI1, KRI2, KRI3
KFRF	Dynamic Floating Rate Fund		KEG, K05, K06, K08, K13, K14, K16, K17, KRI2, KRI3
KGLF	Dynamic Gilt Fund		KEG, K05, K06, K08, K13, K14, K16, K17, KRI1, KRI2, KRI3
FMMF	Dynamic Money Market Fund		K05, K06, K08, K13, K14, K16, K17, KRI2, KRI3
KBDF	Dynamic Bond Fund		KEG,K05,K06,K08,K12,K13,K14,K16,K17,K20,KRI1,KRI2,KRI3
KOPF	Opportunities Fund		K12, K05, K06, K13, K14, K16, K17
KFLF	Dynamic Floor Fund		K12, K05, K06, K08, K13, K14, K16, K17
		100%	

Notes : - Dynamic Money Market Fund is available only in the last policy year.
- Headstart plans only for the following code (K05A, K05B, K06A, K06B, K05C, K05D, K06C & K06D).
- Kotak Smart Advantage (K12) has only 3 fund option viz. Dynamic Bond Fund (KBDF), Dynamic Floor Fund (KFLF) & Opportunities Fund (KOPF)
- Opportunities Fund (KOPF) & Dynamic Floor Fund (KFLF) is not available in Kotak Easy Growth Plan (KEG)
- Opportunities Fund (KOPF) is not available in Kotak Platinum Adv Plus Dynamic A/c (K08)
- In Kotak Smart Advantage Plan there is no unit allocation in the 1st policy year.
- Kotak Money Market Fund is not available for Kotak Easy Growth (KEG).

Product Name/ Code	[] - Kotak Long Life Secure Plus and Wealth Plus (K13 & K14) [] - Kotak Headstart Future Protect and Assure Wealth (K05 & K06)	To (%)	Available in (For Policies issued after 31.12.2009)
FCOF	Classic Opportunities Fund		K05, K06, K13, K14
FFEFE	Frontline Equity Fund		K05, K06, K13, K14
FFLF	Dynamic Floor Fund II		K05, K06, K13, K14
		100%	

Notes : - Headstart plans only for the following code (K05A, K05B, K06A, K06B, K05C, K05D, K06C & K06D).

Product Name/ Code	[] - Kotak Headstart Future Protect and Assure Wealth (K27 & K28) [] - Kotak Long Life Secure Plus and Wealth Plus (K29 & K30) [] - Kotak Platinum Edge (K31) [] - Kotak Single Invest (K33) - Policies Issued after 1..Jan.10 [] - Kotak Wealth Insurance Plan (K38) [] - Kotak Super Advantage (K23) [] - Kotak Headstart Child Assure (K40) [] - Kotak Ace Investment (K42) [] - Kotak Single Invest Advantage (43) [] - Kotak Platinum (K44)	To (%)	Available in
KFRF	Dynamic Floating Rate Fund		K27, K28, K29, K30, K31, K38, K40, K42, K44
FBLF	Balanced Fund		K27, K28, K29, K30, K31, K38, K40, K42, K44
FMMF	Money Market Fund		K27, K28, K29, K30, K31, K33, K38, K40, K42, K44
KGLF	Dynamic Gilt Fund		K27, K28, K29, K30, K31, K33, K38, K40, K42, K44
KBDF	Dynamic Bond Fund		K23, K27, K28, K29, K30, K31, K33, K38, K40, K42, K44
FCOF	Classic Opportunities Fund		K23, K27, K28, K29, K30, K31, K33, K38, K40, K42, K44
FFEFE	Frontline Equity Fund		K23, K27, K28, K29, K30, K31, K33, K38, K40, K42, K44
FFLF	Dynamic Floor Fund II		K23, K27, K28, K29, K30, K31, K33, K38, K40, K42, K44
GPGF	Peak Guarantee Fund	NA	K31, K33
		100%	

Notes : - Switch In not allowed in peak guarantee fund (Post 30th April 10), only switch out is allowed for those customers who have opted for this fund.
- In Kotak Super Advantage (K23) there is no unit allocation in the 1st policy year.

Policy No. _____ Signature of Scribe _____ Signature of Policyholder _____

Product Name/ Code	[] - Kotak Second Innings Plan (K19)	To (%)	Available In (For Policies issued prior to 31st Dec 2009)
KBDF	Pension Bond Fund		K19
KOPP	Pension Opportunities Fund		K19
KFLP	Pension Floor Fund		K19
		100%	

Product Name/ Code	[] - Kotak Second Innings Plan (K19)	To (%)	Available In (Customers who have switched to new funds on or before 15th Mar 10)
PCOF	Pension Classic Opportunities Fund		K19
PFEF	Pension Frontline Equity Fund		K19
PFLF	Pension Floor Fund II		K19
		100%	

Product Name/ Code	[] - Kotak Second Innings Plan (K32) [] - Guaranteed Pension Builder (K24)	To (%)	Available in
KBDF	Pension Bond Fund		K32
PBLF	Pension Balanced Fund II		K32
PFLF	Pension Floor Fund II		K32
PFEF	Pension Frontline Equity Fund		K32
PCOF	Pension Classic Opportunities Fund		K32
PMMF	Pension Money Market Fund II		K32 & K24
PGUF	Pension Guarantee Fund		K24
		100%	

Important Points :

1. Kotak Smart Advantage (K12) has only 3 fund option viz. Dynamic Bond Fund (KBDF), Dynamic Floor Fund (KFLF) & Opportunities Fund (KOPF)
2. Kotak Opportunities Fund and Dynamic Floor Fund is not available in Kotak Easy Growth Plan (KEG)
3. Opportunities Fund (KOPF) is not available in Kotak Platinum Adv Plus Dynamic A/c (K08)
4. Pension Growth Fund is available only with Kotak Secure Retirement Plan (K18) and not available with Kotak Retirement Plans (K04A, K04B & K04C)
5. Dynamic Money Market Fund, Pension Money Market Fund II and Dynamic Money Market Fund is available only in the last policy year.
6. Kotak Money Market Fund is not available for Kotak Easy Growth (KEG).
7. In case of Kotak Safe Investment Plan II 'Frontline Equity Fund' is available only when the GMV falls off.
8. Once 'Frontline Equity Fund' has been opted for, customer cannot have his GMV/Capital Guarantee reinstated at any point of time.
9. Gurantee Fund & Front line Equity Fund is not available for KSIP with product code KULO & Joint Life KSIP policies.
10. Kotak Platinum Adv. Plus product code K16 & K17, only Guaranteed Growth Fund is available.
12. Future Premium Allocation is not permissible for any policy in lapsed status.
13. Future Premium Allocation in peak guarantee fund is not permissible Post 30th April 10.

I hereby declare that Understand and agree to all the conditions and information given above. I further agree and understand that the allocation of future premiums consequent to my request for the same herein shall be governed by the provisions and terms and conditions of the policy contract referred to herein.

		Name of Scribe: _____ Relationship with owner: _____ Contact Details of Scribe: _____
Signature of Policyholder	Signature of Scribe	

Note: In case the policy is assigned, please ensure that this form is signed by the Assignee.

FOR BRANCH OFFICE USE ONLY

Note : Please fax Fund Switch/Future premium re-direction form on 022-66200554. If faxed on any other number then we will not be responsible for delay in processing.

Mode of Receipt : _____
 Request Call ID : _____
 Name of BOE : _____

BRANCH STAMP

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 General A.K. Vaidya Marg, Malad (E), Mumbai – 400 097.
 (+9122) 6605 7757{D} 66200550 {F} <http://insurance.kotak.com/>

ACKNOWLEDGEMENT

We acknowledge the receipt of Fund Switch request for Policy No.: _____ Branch Name: _____
 Name of Branch Co-ordinator : _____ Date : _____ Time : _____