

INDIVIDUAL DEATH CLAIM FORM

For Official Use Only

Branch Name: _____ Branch Code: _____
 Interaction ID: _____
 Employee Name: _____
 Employee Code: _____ Sign: _____
 Date: DD / MM / YYYY Time: ☐ On or Before 3PM ☐ After 3PM

Photograph
of Claimant

SECTION A*

POLICY DETAILS

Policy Number(s): _____

SECTION B*

DETAILS OF LIFE ASSURED (LA)

Name of Life Assured: ☐ Mr. ☐ Ms. FIRST MIDDLE LAST
 Father's Name: FIRST MIDDLE LAST
 Date of Death: DD / MM / YYYY
 Place of Death: ☐ Hospital ☐ Clinic ☐ Residence ☐ Office ☐ Other (Please specify) _____
 Family Doctor: Name: _____ Registration No. _____ Contact No: _____
 Last treated/attended Doctor Name: _____ Registration No. _____ Contact No: _____

Last Employer details (If applicable):

Name of the Company: _____ Name of contact person: _____ Contact No: _____
 Nature of Death: ☐ Medical ☐ Natural ☐ Accident ☐ Murder ☐ Suicide
 Cause of Death: _____

Nature of Illness and Habit of the insured

☐ Hypertension ☐ Diabetes ☐ Heart disease ☐ Liver disease Date of diagnosis of illness
☐ Kidney disease ☐ Cancer ☐ Other _____
☐ Smoking ☐ Tobacco ☐ Drugs If yes, Duration of Consumption _____ & Quantity Consumed

Other Insurance details: (Life/Mediclaim/Health)

Policy No.	Company Name	Sum Assured	Status (Active/Lapsed/Applied/Matured)

DETAILS OF CLAIMANT

DETAILS OF LIFE ASSURED (LA)

Claimant Name: ☐ Mr. ☐ Ms. FIRST MIDDLE LAST
 Date of Birth: DD / MM / YYYY
 Address: FIRST LAST
BUILDING ROADNAME/NO
CITY/VILLAGE LANDMARK
DISTRICT STATE Pincode: _____
 Contact No.: OFFICE RESIDENCE MOBILE
 Office &/or Personal Email ID: _____
 Relation with the Life Assured: ☐ Spouse ☐ Children ☐ Parents ☐ Others SPECIFY
 Claimant's Title: ☐ Nominee ☐ Executor ☐ Trustee ☐ Appointee ☐ Employer ☐ Assignee ☐ Beneficiary ☐ Non-Profit Organization
 Claimant's PAN details: XXXXXXXXXX Or Form 60 ☐
 Politically exposed person: ☐ Yes ☐ No
 US Person: ☐ Yes ☐ No (If Yes, please fill FATCA/CRS certification)

In case of children's plans, if beneficiary is a minor, please provide beneficiary's account details.

Bank Name & Branch:

Account Type: ☐ Savings ☐ Current ☐ NRO ☐ NRE

IFSC: MICR:

Applicable for pension plans:

Please indicate how you would like to receive the benefits.

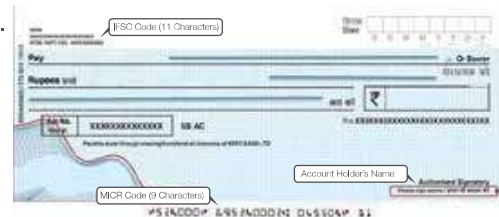
☐ Entire amount as lumpsum ☐ Entire amount as Annuity ☐ Part as annuity, part as Lumpsum ☐ As Installments

Applicable for Tata AIA Life Insurance Sampoorna Raksha/Tata AIA Life Insurance Sampoorna Raksha Plus (Options 2 & 4):

Please confirm if you would like to receive the claim amount as

☐ Monthly income ☐ Lumpsum payout

Note: Selection of this option does not constitute acceptance of claim.



DECLARATION AND AUTHORISATION

- I hereby declare that all the details filled/furnished above are true correct to the best of my knowledge & belief.
- I hereby warrant the truth and correctness of the foregoing particulars in every respect and I agree that if I have made or shall make any false or untrue statement, suppress or conceal any material fact, my right to claim reimbursement of the said expenses shall be absolutely forfeited.
- I understand and agree that the submission of this form does not mean that the request will be processed.
- I understand that any payout under the policy shall be strictly in accordance with the policy terms and conditions.
- Any payment shall be subject to realization of the last renewal premium payment.
- I authorise all the medical establishments (medical labs included), government institutions (police, revenue, etc.) to reveal the treatment information including HIV/AIDS and others, related to the LA, to Tata AIA Life Insurance, from both the past and present.
- A photo copy of this declaration shall be considered as valid and effective.
- I authorise Tata AIA Life Insurance to share and obtain information on behalf of me with any reinsurer, insurance association, medical authorities, other insurers, statutory authorities, employer, court, governmental body, regulator using an investigation agency or other service hereby provide my consent for the same.

Date: D D M M Y Y Y Y

Place: _____

Signature of Claimant:

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The Policyholder has affixed his/her thumb impression/has signed in vernacular/has not filled the application. I hereby declare that the content of this application form has been explained to the Policyholder in _____ language and have truthfully recorded the answers provided to me. I further declare that the Policyholder has signed/affixed his/her thumb impression in my presence.

Name of the Declarant: _____

Date: D D M M Y Y Y Y

Place: _____

Signature of Third Person:

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Important Note: In case of any demand or favour asked by anyone including a company representative towards claim processing or settlement, the same should not be entertained and must be reported to the company immediately on the company's email id: customercare@tataaia.com

INSTRUCTION FOR FILLING UP THE FORM

A. IMPORTANT INFORMATION (Please read before filling the form)

1. The form should be filled by the claimant only. In case the claimant is a minor, the guardian/appointee may fill the form
2. Claims under multiple policies may be registered by filling a single form & providing all applicable policy numbers
3. In case of more than one claimant, separate forms need to be filled for each claimant
4. Please read the declarations carefully and the claimant should sign the claim form in the same manner as you normally sign your cheque
5. Claim is payable subject to fulfillment of all terms and conditions of the policy
6. No fee or commission should be paid to anyone to process this claim
7. Make sure your address, phone numbers and email ID are current and active as the correspondence will happen through this only
8. Asterisk (*) refers to mandatory information

B. DOCUMENTS TO BE SUBMITTED

MANDATORY DOCUMENTS

(1) Original policy document (Not necessary in case of dematerialised policy document) (2) Death certificate issued by local authority (3) Claimant's PAN CARD (4) Claimant's passport size photograph (5) Cancelled cheque

ADDITIONAL DOCUMENTS

HOSPITALISATION/DEATH DUE TO ILLNESS

(1) Medical cause of death certificate (2) Medical records for all the treatments taken in the past. (Admission notes, History / Progress sheet, Discharge / Death summary, Test reports, etc.) (3) Claimant's passport size photograph (5) Cancelled cheque

ACCIDENTAL DEATH (1) First Information Report (FIR), Panchnama / Inquest report, Post-mortem report (PMR), Driving license, Police Final Report, Viscera report (if applicable) Newspaper cutting (s), if any, Others as applicable

Disclaimers: 1. Copies to be submitted and originals to be presented at the time claim submission,
2. Tata AIA Life Insurance reserves the right to ask for more information/ documents, if required

C. LIST OF VALID IDENTITY & ADDRESS PROOFS (Please tick the document submitted)

PHOTO IDENTIFY PROOF (ANY ONE)

- | | | |
|--|--|--|
| ☐ Claimant's PAN Card | ☐ Valid Passport | ☐ Voter ID Card |
| ☐ Aadhar Card* | ☐ Valid Driving License | |

ADDRESS PROOF (ANY ONE)

- | |
|---|
| ☐ Valid Passport |
| ☐ Voter ID Card |

*I voluntarily provide my consent to use my Aadhar to conduct identity check towards KYC compliance by (LI COMPANY NAME) Life

D. NOTE: CLAIMANT NEFT MANDATE/ BANK ACCOUNT DETAILS

- A cancelled personalised cheque with the account no. and IFSC should be submitted along with the NEFT mandate. If the cheque is not personalised, a latest bank statement or copy of passbook (where account number and IFSC is mentioned) needs to be submitted with the mandate.
- This mandate, upon processing, will override any of the previously tagged NEFT mandates for all policies, held by the client with (LI COMPANY NAME) Life.
- In case of NEFT failure or any further requirements pending on the mandate, payout will be kept on hold till fresh NEFT mandate is received. Intimation will be sent to you for the same.

*Refund to NRE account (full or proportionate) will be subject to ratio of premium(s) paid through NRE Account. Please submit a Bank Statement or Bank Confirmation letter as an evidence for premium(s) paid through NRE account.

**In case of proportionate payout, please provide two NEFT mandates i.e. for NRE account and non-NRE account.

CUSTOMER ACKNOWLEDGEMENT COPY-INDIVIDUAL DEATH CLAIM FORM

Policy No.: _____

Claimant Name: _____

Branch Name/Interaction ID: _____

Claimant Client ID: _____

Employee Name: _____

Date: _____

Employee Sign: _____

Employee Code: _____

Branch Stamp:

L&C/Misc/2023/Apr/0169

Tata AIA Life Insurance Company Limited (IRDAI Regn. No.110) CIN: U66010MH2000PLC128403. **Registered & Corporate Office:** 14th Floor, Tower A, Peninsula Business Park, Senapati Bapat Marg, Lower Parel, Mumbai - 400013. Trade logo displayed above belongs to Tata Sons Ltd and AIA Group Ltd. and is used by Tata AIA Life Insurance Company Ltd under a license. For any information including cancellation, claims and complaints, please contact our Insurance Advisor / Intermediary or visit Tata AIA Life's nearest branch office or call **1-860-266-9966** (local charges apply) or write to us at **customer@tataaia.com**. Visit us at: **www.tataaia.com**. • L&C/Misc/2022/Apr/0113.

#TataAIAKaBharosa

**BEWARE OF SPURIOUS PHONE CALLS
AND FICTITIOUS / FRAUDULENT OFFERS**

IRDAI is not involved in activities like selling insurance policies, announcing bonus or investment of premiums. Public receiving such phone calls are requested to lodge a police complaint