

Personal Details Alteration Form

1. Correction in name
2. Change in correspondence address
3. Addition/Change in Nominee

(Valid identity proof and supporting documents are mandatory)

For office use only:

Branch Name: _____

Received on: _____

Received by: _____

Sent to HO on: _____



Sar utha ke jayo!

Personal Details

*Agency Code: _____

*Consultant Name: _____ (First Name) _____ (Middle Name) _____ (Last Name)

 Correction in Name
NOTE:

- For requests pertaining to change of surname and middle name after marriage, marriage certificate is mandatory.
- For all other requests involving significant name change, a gazette copy is required.
- All the supporting documents should be countersigned by the consultant.

Consultant's Corrected Name: _____

 Change in Correspondence Address
NOTE:

- Consultants have to change their address by submitting a request similar to policy servicing request submitted by the customer. Later on, he/she can request a change in address on the IRDAI portal.
- Self-attested address proof of the new address is mandatory.
- Mobile number or any one of the landline phone numbers is mandatory.

*New Address: _____

*City/ District: _____ *PIN Code: _____ *State: _____ *Mobile no.: _____

*Telephone no. (residence): _____ *Telephone no. (office): _____

*Email ID: _____

 Addition/Change in Nominee details
NOTE:

- Self-attested identity and address proof of nominee along with attestation by the Financial Consultant.
- OSV on all the documents accepted by the branch.

*Nominee Full Name : _____

*Address : _____

*Relationship with the Consultant: _____ *Percentage of entitlement : _____

Nominee's old DOB: ____/____/____ (dd/mm/yyyy)*

Nominee's New nominee DOB: ____/____/____ (dd/mm/yyyy)*

Declaration of the Consultant

I declare that the information I have given is factually correct and true. I have not withheld any material information that may influence the assessment or acceptance of this application; else the contract based on the above information will be treated as void.

*Date: ____/____/____ (DD/MM/YYYY)

Place: _____

SIGN HERE

*(Signature of the Consultant)

LIST OF DOCUMENTS ADMISSIBLE AS PROOF OF RESIDENCE

- Passport
- Voter's Identity Card issued by Election Commission of India
- Driving License
- Utility Bill which is not more than two months old of any service provider (electricity, telephone, postpaid mobile phone, piped gas, water bill)
- Property or Municipal Tax receipt
- Bank Account /Post Office Savings Account statement not more than 6 months old.
- Letter issued by Unique Identification Authority of India or National Population Register containing details of Name, Address & Aadhaar No
- Pension or Family Pension Payment Orders (PPOs) issued to retired employees by Government Department or Public Sector Undertakings if contains address
- Letter of allotment of accommodation from employer issued by State or Central Government Departments, Statutory & Regulatory bodies, public sector undertakings, scheduled commercial banks, financial institutions and listed companies. Similarly Leave & License agreements with such employers allotting official accommodation.
- Documents issue by Government Departments of foreign jurisdiction and letter issued by Foreign Embassy or Mission in India.
- Aadhaar Card