

**HDFC Life Group Unit Linked Pension Plan - Fund Switch (LifeStage Allocation Option Applicable for DC Schemes)**

PSNF104206091309  
Comp/Sep/Int/2640

|                     |                       |
|---------------------|-----------------------|
| Investment Option : | Life Stage Allocation |
|---------------------|-----------------------|



|                         |                    |
|-------------------------|--------------------|
| <b>Scheme Type:</b>     | <b>Pension</b>     |
| <b>Trust Name:</b>      |                    |
| <b>Policy Number:</b>   |                    |
| <b>Type of request:</b> | <b>Fund Switch</b> |

**Note : (a) If a member wishes to override the Life Stage Allocation, he/she may choose to allocate his investments into: Liquid Fund II; or Secure Managed Fund II provided the remaining term to vesting is not less than 2 years (b) Switches will be total i.e. 100%. No partial switch is allowed.**

Life Stage Allocation option is available for policies where individual member accounts are maintained with us, such as Defined Contribution Superannuation Schemes. Where this option is selected, the fund value for an individual member's account will be allocated to various funds based on the remaining duration to vesting as per the table below:

| Remaining years to vesting | Investment Allocation |                        |                           |
|----------------------------|-----------------------|------------------------|---------------------------|
|                            | Liquid Fund II        | Secure Managed Fund II | Defensive Managed Fund II |
| Less than 2 years          | 100%                  | 0%                     | 0%                        |
| 2 to 5 years               | 0%                    | 100%                   | 0%                        |
| Greater than 5 years       | 0%                    | 0%                     | 100%                      |

| Sr. No | Account Number | Account Name | Fund Switch From (Tick any one of the below funds) |                        |                           | Fund Switch To (Tick any one of the below funds) |                        |                           |
|--------|----------------|--------------|--|------------------------|---------------------------|--|------------------------|---------------------------|
|        |                |              | Liquid Fund II                                     | Secure Managed Fund II | Defensive Managed Fund II | Liquid Fund II                                   | Secure Managed Fund II | Defensive Managed Fund II |
|        |                |              |  |                        |                           |  |                        |                           |
|        |                |              |  |                        |                           |  |                        |                           |
|        |                |              |  |                        |                           |  |                        |                           |

Yours sincerely,  
Signed for and on behalf of the Trust

1st Signatory : \_\_\_\_\_ 2nd Signatory : \_\_\_\_\_  
Name of Trustee/Authorised Signatory :

Note : Trustees or Authorised Signatories approved by the Board of Trustees or Employer and whose signatures have been submitted in advance to HDFC Life (Formerly HDFC Standard Life Insurance Company Limited) shall only be entitled to execute this request / form. The Policy Holder is requested to keep the signatory list updated with HDFC Life (Formerly HDFC Standard Life Insurance Company Limited) at all times to avoid last minute delays.

Date : \_\_\_\_\_ Place : \_\_\_\_\_ (Rubber Stamp and Address)

**General Rules :**

(1) This investment instruction must be received before the daily cut-off time to obtain the next valuation unit prices. Please contact us for details of our current cut-off times and valuation times. (2) All terms and conditions as specified in the Policy Documents and Schedule thereto shall apply. (3) The plans mentioned in this proposal form have been approved by IRDA (Insurance Regulatory and Development Authority) and have been allotted a Unique Identification Number (UIN). This number is available on IRDA's website for verification. (4) The funds mentioned in this form have been allotted a Segregated Fund Identification Number (SFIN). This number is available in our sales literature and also on our website(www.hdfclife.com) for verification