CKYC No.

🖳 pnb MetLife

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Form for Assignment

Coloured photograph of assignor/ assignee (as applicable)

Documents to be collected in case assignee is an individual

Original policy document

- Any one coloured copy of officially valid document (for ID and address proof), which includes Aadhaar, Passport, Driving License, Election card (Voter id card), Job card
 issued by NREGA, Letter issued under National Population Register containing details of name and address with photograph
- Copy of PAN card or Form 60 (all cases)
- One recent color photograph
- Any one coloured copy of Income proof of the assignee (If annual premium is greater than INR 99,999/-), which includes Income Tax Assessment orders/Income Tax Returns, Employer's Certificate, Form -16 A, Form -16, Recent Pay slips, Bank Cash-flows Statements, Pass-Book, Bank Assessment Form signed by Bank Authorized signatory/SP
- In case of an individual third-party assignment is towards security to a loan availed, a "Promissory note" or "Loan agreement" if any, signed by both assign ee and assignor has to be submitted as proof of consideration (In prescribed format of PNB MetLife)
- New ACH/ Direct debit request from the assignee in case premium is being paid by the assignee (Applicable only in case of absolute assignment and assignee wants to pay future premium through Direct Debit)
- If Proof of possession of Aadhaar is submitted as ID and address proof, touch points to ensure that first 8 digits are properly masked and only last 4 digits are visible

Note: -

- Fields marked with "*" are mandatory to be filled if the request is submitted for individual assignment/ re-assignment to an individual. If any of the fields are not filled the request will not be accepted
- Please refer PNB MetLife India Insurance Company Limited (PMLI) website or contact your nearest branch or call at our Call center as mentioned below herein for necessary documentation required to be submitted for other types of assignment

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*Father's Name (Mr./Dr./Other)		ST				Μ			L	E								L	. Α	S	Т					
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*Spouse Name (Mr./Ms./Mrs./[Dr./Other): F	I R S	Т				M		D	L	E							l	. A	S	Т					
Assignee is (please tick one): 🛛 Blood Relative 🔹 Regulated Institution (by RBI/ SEBI/ IRDAI/ Other)																										
 Non-Regulated Institution/ *Proof of identity and address (Non-Pro				suhm	itter	4)				Otł	ners												
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Notice for Assignment																	_		1		• .				,	
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Vernacular Declaration: To be filled in case policyholder's signatures is in the form of a thumb impression (left thumb) or in a vernacular language:

Name of Declarant:		
Date: DD-MM-YYYY	Place:	Signature:
Witness Details		
Full Name of the Witness:		
Address of the Witness:		
Signature:		
Date: Place:		

Terms and Conditions

- Term 'Assignor' stands for the current policyholder who intends to assign the policy and 'Assignee' stands for the person in whose favour the policy is to be assigned;
- In case the Assignee is a Tax Resident of a country other than India, the FATCA / CRS Questionnaire should be submitted;
- In case the Assignee is a minor, the legal/natural guardian of the minor shall sign on behalf of the minor;
- The Surrender and Cash Withdrawals (wherever applicable) would be admissible after the minor attains the majority;
- PMLI may reject the request for endorsement of Assignment in accordance with the Section 38 of the Insurance Act 1938, as amended from time to time, giving
 reasons for such rejection. The policyholder may approach Insurance Regulatory & Development Authority of India (IRDAI) within 30 days of the receipt of notice of
 such rejection;
- If the policy is assigned to a lender to secure a loan, then the policy shall stand conditionally assigned to the lender till such time the loan, as secured by this policy, is repaid. The lender may surrender/foreclose the policy in case of any non-repayment or NPA by the assignor;
- The Assignor with suitable concurrence from the Assignee/lender shall intimate PMLI about its loan closure for suitable re-assignment of the policy to the Assignor;
- Re-assignment of your policy shall be made by a separate instrument and confirmation provided herein by Assignor and Assignee shall be considered as a consent to make the re-assignment;
- In case of Assignment, please ensure that a fresh nomination is registered by the assignee by submitting a fresh nomination form, as the original nomination gets automatically cancelled by virtue of Assignment;
- In case of re-assignment, if no new nomination is given, nominee details as available in PMLI records would be considered;
- In case premium is being paid by assignee, existing Direct Debit/ ACH active (if any) would get cancelled. In case the assignee wants premium to be deducted through Direct Debit, he/ she need to provide fresh Direct Debit registration request
- Any matter written in vernacular should have the English translation written beneath the same and attested in the manner give n above;
- The Company expresses no opinion as to the legality or validity of the assignment;
- In case the request for assignment/ reassignment is received via email/other digital modes, the assignor has to hand over the policy document to the assignee and vice-versa;
- Policy servicing charges may be levied as applicable.

Assignee Declaration

I hereby declare that the details furnished above are true and correct to the best of my knowledge and belief and I undertake to inform you any of any changes therein, immediately. In case any of the above information is found to be false or untrue or misleading or misrepresenting, I am aware that I may be held liable for it. I hereby consent to receiving information from CKYC Registry through SMS/ Email on the above.

Date:	Signature of Assignor:	Signature of Assignee:
Place:		
- Tucc		
To be filled by Branch Services - Manda	tory	
Request received from Customer	Customer Representative Bank Courier	
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Form Received By: Employee Name:	Employee ID:	Employee Signature:
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Received a request for	against Policy/Solutio	n No:
On	at am/pm	
Received By: Employee Code	Employee Name	
		Branch Stamp
		Branch Stamp
Registered office: Unit No. 701, 702 &	703, 7th Floor, West Wing, Raheja Towers, 26/27 M G Road, Bangalo	re -560001, Karnataka. IRDA of India Registration number 117.
CI No. U66010KA2001PLC028883, ca	II us Toll-free at 1-800-425-6969, Website: www.pnbmetlife.com, Ema	ail: indiaservice@pnbmetlife.co.in or write to us at 1st Floor,
Techniplex -1, Techniplex C	complex, Off Veer Savarkar Flyover, Goregaon (West), Mumbai – 4000	62. Phone: +91-22-41790000, Fax: +91-22-41790203
		Ver 3.7/May'23