

### **Process for updating Bank details and Existence Certificate**

After the merger of few banks there has been a change in bank account numbers/ IFSC code due to which the superannuated employees may not be able to receive pension from ASPs.

Further, there can be following two reasons for not receiving pension:

1. Expiry of Existence Certificate
2. Change in Bank details/ IFSC Code

Following can be done to resume the pension:

1. If you are receiving pension from HDFC:
  - (a) Change Bank details: You are required to send a copy of new cancelled cheque (with fresh details) along with policy number and name of employee from registered email id to [r&psupport@hdfclife.com](mailto:r&psupport@hdfclife.com) with cc to [abhinayb@hdfclife.in](mailto:abhinayb@hdfclife.in)
  - (b) Updation of existence Certificate :
- Fill and submit attached Life Certificate Format and send it to [service@hdfclife.com](mailto:service@hdfclife.com) from registered Email id of pensioner
- click on the provided link and register yourself for submitting Life Certificate online easily through our LIFE99 portal.

**\*Link:-**

<https://life99.in/register/f970d2a67ba3a3e283ce09700d6dfd9ab1c6f247>

**\*Process:-**

**Login Life99 portal-->Services -->Tax Services-->Retirees Corner -->Video Life Certificate -->Submit Now -->Feed Policy Number -->Submit Certificate Online -->Start Video**

2. If you are receiving pension from SBI life:
  - (a)Change Bank details and update existence certificate- Send a copy of Certificate of Existence (duly certified as per form) to us with a copy of cancelled cheque. Copy of same is attached. Same can also be updated using SBI Life- easy access app which is available on android and apple store.
3. If you are receiving pension from LIC
  - (a)Change Bank details and update existence certificate- You are required to send a request letter mentioning annuity details to LIC (along with cancelled cheque) at:

Annuity Department  
7<sup>th</sup> Floor  
LIC Delhi Divisional Office  
Jeevan Prakash Building  
25 KG Marg New Delhi

# Life Certificate

(Applicable only for Annuity products)

**For office use only:**

Branch:

Received at branch on:

Received by:

Interaction ID:

Date : DD/MM/YYYY

Time: \_\_\_\_\_



Sar utha ke jiyo!

## Declaration

**To: HDFC Life Insurance Company Limited**

I, &lt;&lt; Name of Annuitant &gt;&gt;, the annuitant under policy no. &lt;&lt; Policy No. &gt;&gt;, issued by HDFC Life ascertain the eligibility of annuity payment. I hereby submit the Life certificate as required under the annuity contract.

I have made this declaration with full knowledge of the terms and conditions of the annuity contract and with an independent and sound state of mind and in the presence of the Assurer mentioned below.

## Details of the Assurer

Name of Assurer		Employee code of Assurer	
Name of Institution		Designation of Assurer	
Address of Assurer			
ID proof of Annuitant verified	Yes <input type="checkbox"/> No <input type="checkbox"/>		
Serial number of Annuitant ID proof			

Date: DD/MM/YYYY

Place: \_\_\_\_\_

SIGN HERE



Signature of Assurer with Official Seal

Date: DD/MM/YYYY

Place: \_\_\_\_\_

SIGN HERE



Signature of Annuitant

## Guidelines for submission of Life Certificate

- Life Certificate to be filled and signed in the presence of the Assurer.
- Please carry originals of KYC proofs, while visiting the Assurer's place.
- Following individuals can be an Assurer for the Life Certificate:
  - Designated Official of the local Indian Embassy (For NRI/PIO/OCI only)
  - Other Indian Diplomatic Representative (For NRI/PIO/OCI only)
  - Medical Examiner / Doctor
  - Gazette Officer
  - HDFC Life employee / Quality FC / Rajyog FC
  - Bank Branch Head / Head Post Master
- Submit duly filled and signed Life Certificate at any HDFC Life branch.
  - Locate HDFC Life branches at <https://www.hdfclife.com/branch-locator>
  - Email a scanned copy of the mentioned documents from your registered email ID at [service@hdfclife.com](mailto:service@hdfclife.com) / [nriservice@hdfclife.com](mailto:nriservice@hdfclife.com) (NRI customers only).

HDFC Life Insurance Company Limited [Formerly HDFC Standard Life Insurance Company Limited] (HDFC Life).

CIN: L65110MH2000PLC128245. IRDAI Registration No. 101.

Regd. Off: 13th Floor, Lodha Excelus, Apollo Mills Compound, N.M. Joshi Marg, Mahalaxmi, Mumbai - 400 011.

## Customer Acknowledgement Copy (Life Certificate)

Policy No.:  Policyholder's Name: \_\_\_\_\_

HDFC Life Stamp

Branch: \_\_\_\_\_ Date: DD/MM/YYYY Time: \_\_\_\_\_

View Premium Calendar, Pay Premium Online, Track Fluctuations in the Fund Value, Print your Annual Premium Statement, Fund Switch, Revive your Policy & lots more! Visit [www.hdfclife.com](http://www.hdfclife.com) & register for My Account today!Call 1860-267-9999 (Local charges apply). DO NOT prefix any country code e.g. +91 or 00. Available Mon-Sat from 10 am to 7 pm | Email – [service@hdfclife.com](mailto:service@hdfclife.com) | [nriservice@hdfclife.com](mailto:nriservice@hdfclife.com) (For NRI customers only) Visit – [www.hdfclife.com](http://www.hdfclife.com). CIN: L65110MH2000PLC128245.

## CERTIFICATE OF EXISTENCE

Policy/ Master Policy No:	
Annuitant No.:	
Name of Annuitant:	
Address:	
Phone No:	
Email Id:	
Aadhar no.	

Signature of Annuitant

(Self Attested ID Proof to be submitted)

I \_\_\_\_\_ hereby certify that Shri/Smt \_\_\_\_\_  
 (Annuitant's name) son/daughter of \_\_\_\_\_ was alive on 

D	D	M	M	Y	Y	Y	Y
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 and having personally seen him/her.

Name of Certifying Authority:									
Designation and Seal:									
Address:									
Date:	<table border="1" style="display: inline-table;"><tr><td>D</td><td>D</td><td>M</td><td>M</td><td>Y</td><td>Y</td><td>Y</td><td>Y</td></tr></table>	D	D	M	M	Y	Y	Y	Y
D	D	M	M	Y	Y	Y	Y		

Seal and Signature of Certifying Authority

(Please attach self attested address proof if any change of address is required, **request for Address change has to be submitted in person at any of the branches of SBI Life Insurance Co. Ltd.**)

**Acceptable address proofs** - Passport, Voter's Identity Card issued by Election Commission of India, Driving License, Aadhaar Card / Letter issued by the Unique identification Authority of India, 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, Others (please specify)

**(This Form should be signed by the Annuitant before a Gazetted Officer / Registered Medical Practitioner with Registration No. / Post Master / Head Master of the School / Officer of SBI Life above Assistant Manager / Authorized person of Group Master Policyholder / Bank Manager or Officer with his Specimen Signature with Seal)**

**Note of Authority\*** (Please attach a pre-printed cancelled cheque leaf OR self attested copy of bank passbook in case of bank details different from recorded one. If no change please just mention the details below without any proof)

I \_\_\_\_\_ (Annuitant's Name) hereby authorize SBI Life Insurance Co. Ltd. to credit the annuity amount to my bank account as per details given below.

Account No:	
Type of Account:	
Bank Name:	
Branch Address:	

IFSC Code no:

### Aadhaar Consent:

I, < Name of the Customer >, hereby give my voluntary consent to SBI Life Insurance Company Limited (SBI Life) and authorise the Company to obtain necessary details like Name, DOB, Address, Mobile Number, Email, Photograph through the QR code available on my Aadhaar card / XML File shared using the offline verification process of UIDAI. I understand and agree that this information will be exclusively used by SBI Life only for the KYC purpose and for all service aspects related to my policy/ies. I have duly been made aware that I can also use alternative KYC documents like Passport, Voter's ID Card, Driving licence, NREGA job card, letter from National Population Register, in lieu of Aadhaar for the purpose of completing my KYC formalities. I understand and agree that the details so obtained shall be stored with SBI Life and be shared solely for the purpose of issuing insurance policy to me and for servicing them. I will not hold SBI Life or any of its authorized officials responsible in case of any incorrect information provided by me. I further authorize SBI Life that it may use my mobile number for sending SMS alerts to me regarding various servicing and other matters related to my policy/ies.

**\*Disclaimer - Please note direct transfer to be made only if otherwise possible and allowed by banks as per banking regulations, EFT will be possible only if either a cancelled cheque leaf is attached or above stated account details are attested by branch manager of the bank where the bank account is being maintained. SBI life will not be responsible and liable for any losses occurred due to incorrect account details provided by policyholder.**