GROUP SUPERANNUATION SCHEME CLAIM INTIMATION FORM



Policy Number Name of the Trust:		
Type of Claim (please tick one) Normal Retirement Early Retirement Resignation Death		
Name of the member :		
Salutation First Name Surname		
Employee ID: PAN Number (mandatory):		
Date of leaving/death: DDMMYYYYY		
(In case of death claim, please attach the death certificate along with this form)		
DETAILS OF WITHDRAWAL OF UNITS: (ONLY IN CASE OF DEFINED BENEFIT SUPERANNUATION SCHEMES):		
Plan Withdrawal (%) basis Group Short Term Debt Fund		
Group Debt Fund		
Group Balanced Fund		
Group Growth Fund		
Group Capital Guarantee Short Term Debt Fund		
*Please tick the appropriate option below (the options are governed by the Rules of the Scheme):		
A. 2/3 of value of units to be utilised for immediate pension through ICICI Pru Life 1/3 of value of units to be paid in lumpsum (commutation)		
1/2 of value of units to be utilised for immediate pension through ICICI PruLife 1/2 of value of units to be paid in lumpsum (commutation)		
100% of value of units to be utilised for immediate pension through ICICI PruLife		
Specify name of Payee for payment		
B. Open Market Option** or Transfer to the CIT Approved Trust		
Specify name of CIT approved trust for payment		
TDS Rate if applicable (To be provided by trust): • Net taxable salary for current financial year:		
• Tax rate as mentioned would be applicable for Commutation in the first (separation) year.		
• Tax rate as mentioned above would be applicable for Annuity in the first (separation) year. From the second year onwards Annuity income would be treated as sole income for calculating TDS and tax would be applied as per prevailing tax slabs.		
• The effective tax rate has been worked as per the meaning given in the TDS agreement.		
C. DETAILS OF BENEFICIARY IN CASE THE CLAIM IS ARISING DUE TO DEATH		
Full Name of the Beneficiary		
Salutation First Name Surname		
Full Name of the bank: Branch: Branch:		
A/C no.: Date of birth: D D M M Y Y Y Y Gender: Male Female		
Specify age proof (Please attach with this form): Birth certificate Passport School College extract		
Employer's certificate: PSU Govt company Public Ltd company		
DETAILS OF IMMEDIATE PENSION WHERE OPTION CHOSEN IS A (I)		
Annuitant's Full Name		
Salutation First Name Surname		
Full Name of the bank: Branch: Branch:		
A/C no.: Date of birth: D D M M Y Y Y Y Gender: Male Female		
Specify age proof (Please attach with this form): Birth certificate Passport School College extract		
Employer's certificate: PSU Govt company Public Ltd company		
ANNUITY PAYMENTS:		
Frequency of pension payment		
Monthly Quarterly Half yearly Yearly		

ANNUITY OPTIONS - (Please tick the appropriate box)
Life annuity
Life annuity with return of premium
Joint life last survivor (JLLS) (This option is applicable only when annuitant has spouse at time of commencement of pension. Joint life last survivor with return of Purchase price (JLSS) (This option is applicable only when annuitant has spouse at time of commencement of pension.) Life annuity guaranteed for 5 years and life thereafter
Life annuity guaranteed for 10 years and life thereafter
Life annuity guaranteed for 15 years and life thereafter
Life Annuity with Return of Purchase Price on Critical illness (CI) or Permanent Disability due to accident (PD) or Death
Life Annuity with annual increase of 5%
Life Annuity with Return of 50% Purchase Price
Life Annuity with Return of 75% Purchase Price
Life Annuity with Return of Balance Purchase Price
Joint Life, Last Survivor with Return of Purchase Price in parts
Address for communication:
City:
Landline number :
Email id (Personal) :
Name of the spouse (In case of JLLS Policy)
Salutation First Name Surname
Date of birth of spouse (in case of JLLS policy) DDMMYYYYY Specify age proof of spouse (in case of JLLS policy) Dirth cortificate Passport School College extract
(Please attach with this form) Birth certificate Passport School College extract
Mode of Annuity payment: Regular Cheque PDC Electronic Credit* Annuity Card
*In case of Electronic Credit please provide the following details
1. MICR Code
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2. IFSC Code BANK DETAILS:
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2. IFSC Code BANK DETAILS: Bank Name: Branch: Branch: Branch: Branch: STD
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ADVANCE DISCHARGE VOUCHER:	
We (name of the Trust) understand and agree that ICICI Prudential Life Insurance Company sha in relation to the above claim upon the payment of the Claim moneys in case of acceptance of the claim by the	
Please affix ₹ 1/- revenue stamp & sign across the stamp	Stamp of the Trust:
Signature of the authorized signatory Name of the signatory:	
Place: Da	te: [D D M M Y Y Y Y
Signature of the Member/Beneficiary:	

- 1. The units to be withdrawn for the claim payment will be computed by using the NAV on the day of receipt of claim intimation or the last requirement whichever is later. Cut off time for accepting request is 3:00 p.m.
- Applicable charges will be deducted from Payment.
- Eligibility to receive benefits must be confirmed by the Employer/ Trust 3
- Eligibility to receive benefit, nature of benefit and type of pension are governed by the Rules of the Scheme of the Trust.
- Pension will be paid always in arrears.
- Submission Methods: You can submit the form by any of these convenient methods:
 - By email -Please submit the form online by logging into www.iciciprulife.com OR kindly submit the form to mysuperannuation@iciciprulife.com from the official email id of the authorized signatory.
 - By Fax Please fax the form to Group Service at fax no. 022 67100805
 - By Courier Please courier the form to :

ICICI Prudential Insurance Company Limited, Unit no. 1A & 2A, Raheja Tipco Plaza,

Rani Sati Marg, Malad (E),

Mumbai - 400 097.

- 7. The claim cheque would be dispatched to the last address recorded by us
- For any assistance kindly write to us at mysuperannuation@iciciprulife.com
- ICICI Prudential Life Insurance Company shall be discharged of all liabilities in relation to the above claim upon receipt of claim amount by the payee mentioned above.
- 10. Investments are subject to market risks
- 11. Insurance is the subject matter of the solicitation
- 12. Tax benefits are as per the Income Tax Act, 1961, and are subject to amendments made thereto from time to time
- 13. Existence Check for Group Annuity: The life existence check will be carried out by ICICI Prudential Life Insurance Company Ltd. as per its policies and norms for group annuity customers. An intimation letter will be sent along with a detailed verification certificate.. The duly completed certificate must reach our office before the due date as mentioned in the covering letter. If the existence check formality is not completed within 3 months from the date of intimation, the pension payment will be kept on hold till we receive the duly filled & attested existence check certificate from you.

*ICICI Prudential shall process the claim on the basis of the information provided in this claim form without any verification as to the applicability and/or correctness of the same with the Trust Rules.

**ICICI Prudential Life Insurance Company Ltd will not be responsible for completing the formalities / documentation or any other requirement in case the annuitant opts for purchase of annuity from other insurance company under "open market option".

**Payment will be made in favor of the insurance company opted by the annuitant for purchase of annuity or shall be transferred to such approved fund, as opted by

ICICI Prudential Life Insurance Company Limited. Registered Address: - ICICI PruLife Towers, 1089 Appasaheb Marathe Marg, Prabhadevi, Mumbai-400025. IRDAI Regn No. 105. CIN:L66010MH2000PLC127837. Call us on 1-860-266-7766 (10am-7pm, Monday to Saturday, except national holidays and valid only for calls made from India). Trade Logo displayed above belongs to ICICI Bank Ltd & Prudential IP services Ltd and used by ICICI Prudential Life Insurance Company Ltd under license. Comp code: Comp/doc/Nov/2017/0537

Name of Product	UIN No.
ICICI Pru Group Superannuation Plan	105L024V01
ICICI Pru Group Superannuation	105L024V02
ICICI Pru Group Superannuation plus	105L048V01
ICICI Pru Group Superannuation plus	105L048V02
ICICI Pru Group Superannuation Platinum	105L049V01
ICICI Pru Group Superannuation Platinum	105L049V02
ICICI Pru New Group Superannuation	105L069V01
ICICI Pru New Group Superannuation Plus	105L070V01
ICICI Pru New Group Superannuation Platinum	105L071V01
ICICI Pru Group Superannuation Suraksha	105N089V01