



Ref: CO/NB&R/368/2023

22.11.2023

To,
All HODs of Central Office,
All Zonal Offices,
All Divisional Offices,
All P&GS Units,
All Branch Offices & Satellite Offices,
Audit & Inspection Depts, MDC, ZTCs, STCs.

Re: Further Modifications in the Proposal Forms

This has reference to our circulars ref: CO/ NB&R/ 319/ 2022 dated 20.01.2022 and CO/ NB&R/ 359/ 2023 dated 30.05.2023

Certain further modifications, as stated hereinafter, have been incorporated in the Proposal Forms owing to various recommendations and regulatory requirements.

- 1) Customer Id
- 2) CKYC number (Centralised KYC Registry number)
- 3) FATCA question and declaration (Foreign Account Tax Compliance Act)
- 4) The word "Third Gender" is paraphrased as "Transgender"
- 5) The provision in respect of successive nomination is deleted
- 6) Permanent Address should be as per the POI (Proof of Identity), which must be any one of the following :-
 1. Aadhaar Card
 2. Driving Licence
 3. Voter Card
 4. Passport
- 7) Correspondence Address should be stated only if the same is different from the Permanent Address and it should be supported by documentary evidence such as electricity bill, gas bill, lease agreement, letter of allotment of quarters, company flat etc.
- 8) Change in Declaration (para pertaining to consent for phone calls and sms)

It may be noted that submission of PAN Card or, wherever a proponent does not have PAN (Permanent Account Number), declaration in Form No. 60 is mandatory.

All the revised proposal forms and the addendum for plan specific details, which to be used for LIC's Dhan Sanchay (Plan No. 865), LIC's Jeevan Azad (Plan No. 868), LIC's Dhan Vriddhi (Plan No. 869), LIC's Jeevan Kiran (Plan No. 870), LIC's Aadhaar Stambh (Plan No. 943)&LIC's Aadhaar Shila (Plan No. 944)are annexed hereto.

With regard to sales initiated by POSP-LI, the Part-1 (Key Features Document) of the Key Features Documents (KFD) cum Proposal Form for various plans is annexed to the respective plan introduction circulars, available on the Product Development Department site. Part-2 (Proposal Form) of the Key Features Documents (KFD) cum Proposal Form for various plans are annexed hereto.

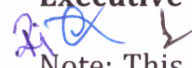
Agent's Confidential Report applicable to different plans are also attached.

All offices to ensure that the modifications are incorporated in the existing stock of proposal forms by way of an addendum or a stamp. Subsequently as and when printing of proposal forms is taken up, the revised proposal forms annexed hereto may be printed in bilingual / trilingual as per the existing practice. The font and the font size in the proposal forms should be as prescribed by the IRDA (Cir ref: IRDAI/ Life/ Misc/ Cir/ 073/ 2013 dated 03.03.2014).

Needless to add that while printing no changes should be made in the wordings or the sequence of the questions in the proposal forms.

The above guidelines come into force with immediate effect.


Executive Director (New Business & Reinsurance)


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