Birla Sun Life Insurance Company Limited

Registered office: 6th floor, Vaman Centre, Makhwana Road, Off Andheri Kurla Road
Andheri (E), Mumbai – 400 059. Call Centre: - 1-800-22-7000 www.birlasunlife.com

Birla Sun Life Insurance

TOP UP FORM

(Kindly fill in BLOCK LETTERS only)

Policy No/
Application No :

Client Name :

Title First Name Surname

Top Up Payment Details

a. Amount Paid : ______________ Cash@ ☐ Cheque/ DD ☐

In words : ____

b. Payment details : ______________ ______________ ______________________

\# Cheque/ DD No Dated Drawee Bank & Branch

\# Strike off whichever not applicable. @ Cash accepted at branches upto Rs 20,000 only.

Top up limits and loadings

	Flexi Secure Life Retirement Plan	Modified Flexi Plans	ClassicLife
Minimum Amount	10,000	5,000	10,000
Maximum Amount	No Limit	50,000 or Annual premium whichever is higher	No Limit
Loading Fee	1%*	2%*	1.50%*
Top Up Timing	No top-ups will be allowed 5 years before the maturity date of the policy.	Allowed from the time of inception of the policy	Allowed from the time of inception of the policy

* As % of Top Up Amount

Please read all instructions before signing the form

- Top Ups are permitted only for Flexi Plans, Flexi Secure Life Retirement Plan And ClassicLife Plan.
- Any Payment can be considered as Top Up only after the policy premium for that year is fully received.
- The top up amount will NOT change the face value of the policy- the face value will remain unaltered.
- If the amount is received within 25 days before policy anniversary, it will be treated as renewal premium for the next policy year
- If total premium paid in a year (i.e. regular premium + top ups) exceeds 20 % of sum assured.
  a Tax exemption under Section 10 (10D) may not be available (except in the case of death).
  b Deduction under section 80 C of Income Tax Act, 1961 may be restricted to 20 % of sum assured in a year
- For ClassicLife Plan, allocation of Top up will be as per the current deposit allocation ratio. For change of deposit allocation, please submit a Policy Service Request Form.
- Cheque / DD should be drawn on bank's local branch in favour of "Birla Sun Life Insurance – Policy No. _________."

I hereby declare that I am aware of the administrative rules of Birla Sun Life Insurance for Top Up.

Signature of the Policy Owner/ Assignee/ Trustee ______________________

Date | D | D | M | M | Y | Y | Y | Y |