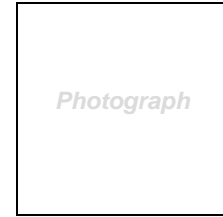




**OPTIMA PLUS - PROPOSAL FORM**

The information provided by me in this document is True to the best of my knowledge.



Signature of Proposer

Application Number \_\_\_\_\_

This proposal will be the basis of any insurance Policy that We may issue. You must disclose all facts relevant to all persons proposed to be Insured that may affect Our decision to issue a Policy or its price, terms, conditions and exclusions. Non-compliance may result in the avoidance of the Policy. If there is insufficient space for You to provide information whether as requested or otherwise, please attach a separate sheet. If You are in any doubt, please seek the advice of Your insurance advisor.

We are under no obligation to accept any proposal for insurance. If We accept a proposal for insurance, it shall be subject to the Policy terms and conditions and We shall have no liability to make any payment under the Policy if premium is not received by Us in full and in time, or is not realised, or non-fulfillments of Pre Policy Checkup.

Write the name of the person above the photograph.

1. Please fill the form in BLOCK LETTERS.
2. Please answer all the questions fully and correctly. If a particular question is not applicable to you, please mark that question as Not Applicable "N/A".
3. The Company's liability does not commence until the acceptance of the proposal has been formally intimated to the Policyholder and full premium has been realized by the Company.

Intermediary Code	Intermediary Name	Intermediary Number

**1. PROPOSER DETAILS**

Name of the Proposer			
Date of Birth			
Nationality			
Residential Status	<input type="checkbox"/> Resident Indian	<input type="checkbox"/> NRI / OCI	
Current Country of Residence			
Address			
<input type="checkbox"/> Please tick if your permanent address is same as above. If not, kindly fill in Permanent address below:			
Permanent address			
E-Mail			
GSTIN / UIN (if any)			
Marital Status			
Contact Number			
Permanent Account Number (PAN)			
I have eIA	<input type="checkbox"/> Yes		<input type="checkbox"/> No
I would like to apply for eIA	<input type="checkbox"/> Karvy	<input type="checkbox"/> CAM S	<input type="checkbox"/> NSDL <input type="checkbox"/> CDSL
Annual Income	<input type="checkbox"/> Upto 2.5 Lac		<input type="checkbox"/> 2.5 Lac to 5 Lac
	<input type="checkbox"/> 5 Lac to 15 Lac		<input type="checkbox"/> 15 Lac to 30 Lac

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Optima Plus | Product UIN: HDHHLIP21336V022021 |



	<input type="checkbox"/> Above 30 Lac		
Education Level			
Employee ID (Employees of HDFC Group and Munich Re Group)			
Policy Number of any active HDFC ERGO Policy where you are the Policyholder			
CKYC No.			
Are you a Politically Exposed Person (PEP) or family member/ close relative / associate of PEP	<input type="checkbox"/> Yes	<input type="checkbox"/> No	
<p><i>Note: Politically Exposed Persons" (PEPs) are individuals who have been entrusted with prominent public functions by a foreign country, including the heads of States or Governments, senior politicians, senior government or judicial or military officers, senior executives of state-owned corporations and important political party officials</i></p>			
Occupation	<input type="checkbox"/> Salaried	<input type="checkbox"/> Self Employed	<input type="checkbox"/> Business Owner
	<input type="checkbox"/> Student	<input type="checkbox"/> Housewife	<input type="checkbox"/> Retired
	<input type="checkbox"/> Others		
	If others, please select source of income whichever is applicable: <input type="checkbox"/> Rentals <input type="checkbox"/> Interest <input type="checkbox"/> Pension <input type="checkbox"/> Investment		
Industry Type	<input type="checkbox"/> Antique dealer	<input type="checkbox"/> Art dealer	<input type="checkbox"/> Jewellery
	<input type="checkbox"/> Import-Export	<input type="checkbox"/> Mining	<input type="checkbox"/> Shipping
	<input type="checkbox"/> Scrap Dealing	<input type="checkbox"/> Agriculture	<input type="checkbox"/> Stock Broking
	<input type="checkbox"/> BFSI	<input type="checkbox"/> Real Estate	<input type="checkbox"/> Manufacturing
	<input type="checkbox"/> if Others, please specify _____		



Is your total aggregate premium across all products with HDFC ERGO General Insurance Company Limited more than INR 2 lakhs?	<input type="checkbox"/> Yes	<input type="checkbox"/> No
Do you have investable assets for more than INR 5 crores? ( <i>Investable assets like cash holdings, deposits, stocks and bonds etc.</i> )	<input type="checkbox"/> Yes	<input type="checkbox"/> No
Is your total aggregate premium across all retail products with HDFC ERGO General Insurance Company Limited INR 30 lakhs or more?	<input type="checkbox"/> Yes	<input type="checkbox"/> No

**Profession:** Salaried  Self-Employed  Others  Details \_\_\_\_\_  
**ID Proof Type:** PAN  Passport  Driving License  Voter's Card  Others   
**ID proof No:** \_\_\_\_\_

**2. Plan Details**

**Sum Insured:** Rs. 500,000  
**Deductible:** Rs. 100,000  Rs. 200,000  Rs. 300,000  Rs. 400,000  Rs. 500,000

**Proposed Policy Peric** From  To

**3. Proposed Insured(s) Details**

S. No.	Name	Date of Birth	Gender (M/F/TG)	Height (in cms)	Weight (in kgs)	Relationship with Proposer	Politically Exposed person (Y / N)	ABHA ID (if available)
1								
2								
3								
4								
5								
6								

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Optima Plus | Product UIN: HDHHLIP21336V022021 |



Note: In case any insured person(s) wish to generate his/her ABHA ID. Kindly visit the link:  
<https://healthid.ndhm.gov.in/register>

**4. Nominee Details**

In the event of the death of an Insured Person any payment due under the Policy shall become payable to the nominee in accordance with the Policy terms and conditions. The nominee must be an immediate relative of the Proposer. For all other persons proposed to be insured, the Proposer shall be the Nominee.

Name of Person Proposed to be insured	Name of Nominee	Relationship	Address of the Nominee	Permanent Address of Nominee (If same not required to be filled)	e-mail of Nominee	Mobile number of Nominee	Bank account number of Nominee	IFSC Code	Name of the Bank	% Share of Nomination

Nominee Name	Relationship	Address of the Nominee

*\*If the Nominee is minor, Name and Address of Assignee and Relationship with Minor:*

- Note:
- The nominee must be an immediate relative of the Proposer. Nominee for any of the persons proposed to be insured shall be the Proposer.
  - Name of Nominee should be as per bank records to ensure smooth processing

Assignee Name	Relationship	Address of the Assignee

**5. Existing/ Previous Insurance Details**

Is the proposer or any of the persons proposed, already Insured under a plan with HDFC ERGO General Insurance Limited or any other insurer or is a proposal pending for Policy issuance? If yes, please indicate below the Policy/ Application number(s) (Please mention application number in case of pending proposal.)

Since when are continuously insured:  
 Do you want Us to consider these details for continuity? Yes  No

Policy No / Application No	Insurer	Period of Insurance		Sum Insured (Rs)	Claims lodged during the preceding 3 years
		From	To		
		DD/MM/YYYY	DD/MM/YYYY		
		DD/MM/YYYY	DD/MM/YYYY		
		DD/MM/YYYY	DD/MM/YYYY		
		DD/MM/YYYY	DD/MM/YYYY		
		DD/MM/YYYY	DD/MM/YYYY		
		DD/MM/YYYY	DD/MM/YYYY		

**6. Medical and Lifestyle information**

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Optima Plus | Product UIN: HDHHLIP21336V022021 |



Important : You must answer the following questions truthfully. Not doing so affects your coverage in case of a Claim

Signature of the Proposer

Medical History: Please answer the below mentioned questions in Yes(Y)/No (N)

<b>Section A: Have any of the persons proposed to be insured ever suffered from/currently suffering from any of the following :</b>	<b>Insured 1</b>	<b>Insured 2</b>	<b>Insured 3</b>	<b>Insured 4</b>	<b>Insured 5</b>	<b>Insured 6</b>
i. Hypertension, chest pain, Ischemic heart disease or any other cardiac disorder	Y/N	Y/N	Y/N	Y/N	Y/N	Y/N
ii. Tuberculosis, asthma, bronchitis or any other lung/respiratory disorder	Y/N	Y/N	Y/N	Y/N	Y/N	Y/N
iii. Ulcer(stomach/duodenal), hepatitis, cirrhosis or any other digestive or liver/ gallbladder disorder	Y/N	Y/N	Y/N	Y/N	Y/N	Y/N
iv. Renal failure, calculus or any other kidney/urinary tract or prostate disorder	Y/N	Y/N	Y/N	Y/N	Y/N	Y/N
v. Dizziness, stroke, epilepsy, paralysis or other brain/ nervous system disorder	Y/N	Y/N	Y/N	Y/N	Y/N	Y/N
vi. Diabetes, thyroid disorder or any other endocrine disorder	Y/N	Y/N	Y/N	Y/N	Y/N	Y/N
vii. Tumor-benign or malignant, any ulcer/growth/cyst	Y/N	Y/N	Y/N	Y/N	Y/N	Y/N
viii. Arthritis, spondylosis or any other disorder of the muscle/bone/joint	Y/N	Y/N	Y/N	Y/N	Y/N	Y/N
ix. Diseases of the nose/ear/throat/teeth/ eye(please mention dioptries)	Y/N	Y/N	Y/N	Y/N	Y/N	Y/N
x. HIV/AIDS or sexually transmitted diseases or any immune system disorder	Y/N	Y/N	Y/N	Y/N	Y/N	Y/N
xi. Anaemia, leukaemia or any other blood/lymphatic system disorder	Y/N	Y/N	Y/N	Y/N	Y/N	Y/N
xii. Psychiatric/mental illnesses or sleep disorder	Y/N	Y/N	Y/N	Y/N	Y/N	Y/N
xiii. DUB, fibroid, cyst/fibroadenoma or any other gynecological/breast disorder	Y/N	Y/N	Y/N	Y/N	Y/N	Y/N

<b>Section B: Have any of the persons proposed to be insured:</b>	<b>Insured 1</b>	<b>Insured 2</b>	<b>Insured 3</b>	<b>Insured 4</b>	<b>Insured 5</b>	<b>Insured 6</b>
xiv. Been addicted to alcohol, narcotics, habit forming drugs or been under detoxication therapy	Y/N	Y/N	Y/N	Y/N	Y/N	Y/N
xv. Been under any regular medication (self/ prescribed)	Y/N	Y/N	Y/N	Y/N	Y/N	Y/N
xvi. Undertaken any lab/blood tests, imaging tests viz. scans/MRI in the last 5 years	Y/N	Y/N	Y/N	Y/N	Y/N	Y/N
xvii. Undertaken any surgery or a surgery been advised in the last 10 years or is a surgery still pending	Y/N	Y/N	Y/N	Y/N	Y/N	Y/N
xviii. Suffered from any other disease/illness/accident/injury	Y/N	Y/N	Y/N	Y/N	Y/N	Y/N
xix. Is any of the insured persons pregnant? If yes please mention the expected date of delivery	Y/N	Y/N	Y/N	Y/N	Y/N	Y/N
xx. Any complaint of diabetes, hypertension or any complication during current or earlier pregnancy	Y/N	Y/N	Y/N	Y/N	Y/N	Y/N

<b>Section C: Name and details of Illness/ Medicine/ Test/ Surgery/ Diopter grade (for questions answered as Yes in Section A &amp; B)</b>	<b>Diagnosis date</b>	<b>Date of last consultation</b>	<b>Treatment in/outpatient</b>	<b>Doctor/ Hospital Name and Phone No.</b>
<b>Insured 1</b>				

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Optima Plus | Product UIN: HDHHLIP21336V022021 |



Insured 2				
Insured 3				
Insured 4				
Insured 5				
Insured 6				

**Section D: Name, address, qualification and contact details of the family doctor, if any**

Name:			
Qualification:			
Address:			
Pin Code		Mobile No:	
Phone No:		Email ID:	

Section E: Does any person proposed to be insured smoke or consume gutkha/pan masala or alcohol. If yes please indicate the name and quantity per week.	Alcohol	Smoke	Pan Masala	Others
Insured 1				
Insured 2				
Insured 3				
Insured 4				
Insured 5				
Insured 6				

Section F: In respect of any of the persons proposed to be insured:	Insured 1	Insured 2	Insured 3	Insured 4	Insured 5	Insured 6
Has any application for life, health or critical illness insurance ever been declined, postponed, loaded or been made subject to any special conditions by any insurance company?	Y/N	Y/N	Y/N	Y/N	Y/N	Y/N

Other Items

Go Green and make a difference to our planet! We shall provide you with soft copy of your Policy at your registered e-mail id.

Note: Soft copy of your policy can be easily accessed at your fingertips to refer to terms and conditions, for lodging claims and for any other service needs.

Additionally, by ticking the check box we understand that you wish to have a physical copy of your policy.

For details on the process to receive your physical policy kindly visit "Help" section on [www.hdfcergo.com](http://www.hdfcergo.com) or contact our customer care for the same

**7. Payment Details**


Please make a Crossed Cheque/DD/Pay Order in favour of 'HDFC ERGO General Insurance Company Limited' only.

Premium Details: Amount Rs.
Premium Payment Options –Single/Monthly / Quarterly / Half Yearly / Annual
Premium Payment Options - Cheque / DD / Card /ECS/Wallet

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Optima Plus | Product UIN: HDHHLIP21336V022021 |



Instrument Details: \_\_\_\_\_ Date \_\_\_\_\_

**For refund (Excess Premium/PPC reimbursement) and for payment of claims credited directly into**

Please provide the following bank details and a copy of a Cancelled Cheque for direct credit into your bank account:

Cheque No		Name as in Bank Account	
Bank Name		Bank Account No	
Branch Name		IFSC Code	
Cheque Date		MICR Code	
Cheque Amount for ₹			

Note:

1. The Proposer agrees and undertakes to intimate in writing to HDFC ERGO about any change in bank account details.
2. Cancelled Cheque should be of the same bank account in which the refund needs to be credited directly
3. Name on Cancelled Cheque should match with Proposer Name to ensure smooth refund / claim processing
4. If ECS is selected, please submit the standing instruction form available at our branches.

**Additional Information**

**(If there is insufficient space to provide additional relevant information, whether as requested or otherwise, please attach extra sheet duly signed.)**

**Declaration, Consent & Warranty on behalf of all Person(s) proposed to be insured**

- i I/We hereby declare on my behalf and on behalf of all persons proposed to be insured that the above statements are true and complete in all respects to the best of my knowledge and that I/We am/are authorized to propose on behalf of these other persons including the minor/s insured, if any.
- i I/ We understand that the information provided by me/ us will form the basis of insurance policy, is subject to the Board approved underwriting policy of the Insurance company and that the policy will come into force only after full receipt to the premium chargeable.
- i I/We further declare that I/We will notify in writing any change occurring in the occupation or general health of the life to be insured/proposer after the proposal has been submitted but before communication of the risk acceptance by the Insurance Company.
- i I/We declare and further consent to the Insurance Company to seek medical and other relevant information from any hospital who at any time has attended the person to be insured/proposer or from any past or present employer concerning anything which

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Optima Plus | Product UIN: HDHHLIP21336V022021 |



affects the physical and mental health of the person to be insured / proposer and seeking information from any insurance company to which an application for insurance on the person to be insured /proposer has been made for the purpose of underwriting the proposal and /or claim settlement.

- i I/ We declare and provide my unconditional consent that, pursuant to a claim filed by me/ us, the Insurance Company can seek medical and other relevant information/ documents for me/ us from any Doctor and/ or Hospital where I, or other Insured, had taken treatment i.e. OPD and/ or hospitalization etc.
- i I/We authorize the Insurance Company to share information pertaining to my proposal, including the medical records for the sole purpose of underwriting and/ or claims.
- i I/ We authorize the Company to process my/ our Personal information for profiling purposes and contact me/ us for (i) communicating for renewal of the Policy, (ii) upsell and/ or cross sale of other insurance products.
- i I/ We authorize the Insurance Company to share my/ our Personal Information and other relevant records details with (i) the Law Enforcement Agencies, as and when demanded and (ii) any other vendor as per the requirement etc. like printing the Insurance policy/ renewal reminders or any other such activity.
- i I/ We authorize the Insurance Company to share my/ our Personal Information and/ or medical Information/ records with any Government and/ or Statutory authorities/ bodies, including but not limited to Insurance Regulatory and Development Authority of India (IRDAI), Insurance Information Bureau (IIB) and/ General Insurance Council etc.
- i Customer Satisfaction Surveys: I/ We hereby consent to the Insurance Company to use and share my/ our Personal Information with the vendors for the purpose of conducting customer satisfaction surveys and related activities aimed at improving service quality and enhancing the overall customer experience.
- i Ayushman Bharat Health Account (ABHA) Declaration : I/We provide my/ our consent to access my/ our (all insured) medical and personal records/ details, as are available in my/ our Ayushman Bharat Health Account (ABHA) and share the same with Third Party Administrators, Reinsurer (if applicable), Service Provider/s of HDFC ERGO and/or with any Governmental and/or Regulatory authority for the sole purposes of underwriting my/ our proposal and/ or for checking the authenticity of claims lodged by me/ us and/ or to comply with the applicable Law/ Regulations.
- i I/We hereby consent that, in any of the above scenarios, my/ our Personal Information and the medical documents etc. can be shared, and/ or accessed, as the case may be, without any intimation to me/ us
- i I hereby grant consent to Agent/Broker/Corporate Agent or any other licensed intermediary to share my KYC (Know your Customer) and customer due diligence information with HDFC ERGO General Insurance Company Limited for the purpose of my insurance proposal..

	Date
Signature of the Proposer	
Time	Place

**Note:** The liability of the company does not commence until the acceptance of the proposal has been formally intimated by the insured and full premium has been realized by the company.  
 We are under no obligation to accept any proposal for insurance. The Proposer agrees that the receipt of the Proposal Form by HDFC ERGO General Insurance Company Limited along with the premium payment does not tantamount to the acceptance of the Proposal for insurance by HDFC ERGO General Insurance Company Limited and does not result in a concluded contract of insurance. The acceptance of the Proposal for insurance shall be at the Company's sole and absolute discretion and upon full realization of the premium payment. In the event of acceptance of the Proposal for insurance by





HDFC ERGO General Insurance Company Limited, such acceptance shall be specifically intimated to the Proposer by HDFC ERGO General Insurance Company Limited along with the date from which the insurance Cover shall become effective.

HDFC ERGO General Insurance Company Limited shall not be liable for any claim in respect of an event giving rise to a claim covered under the Policy of Insurance that has occurred prior to policy issuance is not covered under this policy.(Your proposal form will be considered after HDFCERGO General Insurance Company Limited receives premium payment.)

**Fraud Warning:** This policy shall be voidable at the option of the Company in the event of mis-representation, mis-description or non-disclosure of any material particulars by the Proposer. Any person who, knowingly and with intent to fraud the insurance company or any other person, files a proposal for insurance containing any false information, or conceals or the purpose of misleading, Information concerning any fact material thereto, commits a fraudulent insurance act, which will render the policy voidable at the sole discretion of the insurance company and result in a denial of insurance benefits.

**Anti-Rebating Warning:** As per Section 41 of the Insurance Act 1938,as amended, the practice of rebating is prohibited, as follows: No person shall allow or offer to allow, either directly or indirectly, as an inducement to any person to take out or renew or continue an insurance policy in respect to any kind of risk relating to lives or property in India, any rebate of the whole or part of the commission payable or any rebate of the premium shown on the policy, nor shall any person taking out or renewing or continuing a policy accept any rebate, except such rebate as may be allowed in accordance with the published prospectus or tables of the insurer. Violation of Section41 of the Insurance Act 1938, as amended, shall be punishable with a fine which may extend to Rs.10Lakhs.

**Vernacular Declaration/ assistance deceleration**

Declaration in case the proposal is filled by other than the Proposer if the proposer is illiterate or having disability and requires assistance in completing the proposal form (to be certified by someone other than agent/employee of the company) (The content of this form and its particulars have been explained by me to the Proposer who has understood and confirmed the same.)

<b>Name of the Translator / Representative</b>		
<b>Place</b>		
<b>Date</b>		
		<b>Signature of the Translator / Representative</b>

<b>Name of the Proposer</b>		
<b>Place</b>		
<b>Date</b>		
		<b>Signature of the Proposer</b>

**INSURANCE IS THE SUBJECT MATTER OF SOLICITATION**

**10. AGENT’S DECLARATION**

I, \_\_\_\_\_ (Full Name) in my capacity as an Insurance Advisor/ Specified Person of the Corporate Agent/Authorised employee of the Broker/Relationship Officer, do hereby declare that I have explained all the contents of this Proposal Form, including the nature of the questions contained in this Proposal Form to the Proposer including statement(s), information and response(s) submitted by him/her in this Proposal Form to questions contained herein or any details sought



herein will form the basis of the Contract of Insurance between the Company and the Proposer, if this Proposal is accepted by the Company for issuance of the Policy. I have further explained that if any untrue statement(s)/ information/response(s) is/are contained in this Proposal Form/including addendum(s), affidavits, statements, submissions, furnished/to be furnished, the Company shall have the right to vary the benefits which may be payable and further more if there has been a non-disclosure of any material fact, the policy issued to his/her favour pursuant to this Proposal may be treated by the Company as null and void and all premiums paid under the Policy may be forfeited to the company.

License No.(Advisor/Corporate Agent/Broker/Relationship Officer)

**Place:**  
**Date: Signature of Agent:**

**11. Checklist**

Please check the following documents are attached along with the proposal form

- 1. ID Proof: Passport/ PAN Card/ Voter ID/ Driving License/ Letter from a recognized public authority
- 2. Proof of residence: Telephone Bill/ Bank Account Statement/ Letter from any recognized public authority/Electricity Bill/ Ration Card
- 3. Age Proof: Proof of Age
- 4. Renewal Notice with claim details
- 5. Certification of previous insurer for previous claim details
- 6. Photocopies of all previous policies and endorsements

**10. For Office use only**

**HDFC ERGO General insurance Office Code:** \_\_\_\_\_ **Advisor Code and Name:** \_\_\_\_\_  
**Branch Receipt Date:** \_\_\_\_\_ **Channel Type:** \_\_\_\_\_  
**Business Type:** Urban/ Rural/ Social

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**Acknowledgement**

Application Number: \_\_\_\_\_  
Date: \_\_\_\_\_

Name of the Proposer \_\_\_\_\_

We acknowledge with thanks the receipt of your application and amount by cheque/Demand Draft/others  
of amount of Rs. \_\_\_\_\_.

Neither the submission to us of a completed proposal for insurance nor any payment for any policy sought obliges us to agree to issue a policy, which decision is and always shall be in our sole and absolute discretion. If we accept a proposal for insurance, it shall be subject to the policy terms and conditions and we shall have no liability to make any payment if premium is not received by us in full and in time, or is not realised, or non-fulfillments of Pre Policy Checkup. If we do not accept the proposal, we will inform you and refund any payment received from you without interest within next 30 days.

**Signature of the receiver and office seal.**