



Milkar life aage badhaein

PNB MetLife India Insurance Company Limited

Registered office: Unit No. 701, 702 & 703, 7th Floor, West Wing, Raheja Towers, 26/27 M G Road, Bangalore -560001, Karnataka. IRDA of India Registration number 117.

CI No. U66010KA2001PLC028883, call us Toll-free at 1-800-425-6969, Website: www.pnbmetlife.com,

Email: indiaservice@pnbmetlife.co.in

Or write to us at 1st Floor, Techniplex -1, Techniplex Complex, Off Veer Savarkar Flyover, Goregaon (West), Mumbai – 400062. Phone: +91-22-41790000, Fax: +91-22-41790203

Financial Payout Request – Annuity Payout

Definition: An annuity is a contract between the Annuitant - and an insurance company, who promises to pay a certain amount of money, on a periodic basis, for a specified period. The annuity provides a kind of retirement-income insurance: contributing funds to the annuity in exchange for the guaranteed income stream of choosing later in life. The annuity under any policy will be payable in accordance with the annuity option and at the annuity frequency chosen by the Annuitant.

Sno.	Documents	Submission of Service Request by Policy Owner in PNB MetLife or Bank (PNB/JKB & KBL) or CAMS Branches	Submission of Service Request by Policy Owner through Courier	Submission of Service Request by Third Party in PNB MetLife or Bank (PNB/JKB & KBL) or CAMS Branches	Customer Portal	E-mail from registered email ID
1	Policy Servicing Request form duly filled and signed by the Policy Owner	Yes	Yes	Yes	No Such Option	No Such Option
2	Original Policy Document (PD): Note: Indemnity bond / Duplicate PD can be submitted in case original PD is not received/destroyed/lost etc.	Yes	Yes	Yes		
3	Self-attested ID proof of Policy Owner Note : Customer should carry the original documents in case of physical submission	Yes	Yes	Yes		
4	Cancelled cheque leaf / Copy of self-attested bank passbook / Copy of Self-attested bank statement - containing the Account holder's name, A/c No. & IFSC code	Yes	Yes	Yes		
5	If request submitted by Third Party, following document of PO will be provided: 1. Copy of latest Bank Statement having account number same as provided at the time of Proposal Login OR 2. Copy of Bank Statement reflecting premium paid to PNB MetLife OR 3. Original ID proof same as provided at the time of Proposal Login of the policy owner OR 4. Self-Attested ID proof like Passport/ Adhaar Card/ Driving License along with original of the same	No	No	Yes		
6	If request submitted by Third Party with Indemnity bond / Duplicate PD, following document of PO will be provided: 1. Copy of latest Bank Statement having account number same as provided at the time of Proposal Login OR 2. Copy of Bank Statement reflecting premium paid to PNB MetLife OR 3. Original ID proof same as provided	No	No	Yes		

	at the time of Proposal Login of the policy owner					
7	Application for Immediate Annuity Plan (If opting to purchase annuity from PNB MetLife)	Yes	Yes	Yes		
8	Self-Attested Address Proof Note : Mandatory only in case of Indemnity/DPD requests or where there is an address change	Yes	Yes	Yes		
9	Policy Owner Authorization Letter and ID proof of the person submitting the request on behalf of Policy Owner	No	No	Yes		

Note :

Out of proceeds of existing plans, customer can opt for one of following options:

1. Purchase annuity for full amount from PNB MetLife
2. Can opt for a payout for up to 1/3rd as a Lump sum (33.33% maximum and minimum of Rs.5000 as per eligibility) and rest in purchase of annuity from PNB MetLife
3. Can opt for a payout for up to 1/3rd as a Lump sum (33.33% maximum and minimum of Rs.5000 as per eligibility) and rest in purchase of annuity from some other insurance company. (Through cheque from PNB MetLife in the name of insurance company)
4. Entire amount through cheque for purchase of annuity from some other company.

You may visit our Website (<https://www.pnbmetlife.com>) for information on below points:

- **Vesting Benefit Request Form Version 2.4 for submission of the above mentioned service request**

Go to Download Forms >> Service Forms >> Select Regional Language – **Vesting Benefit Request Form Version 2.4**

- **Customer Authorization Letter – Policy Owner Servicing Request Version 1.0 if request is being submitted through Third-Party**

Go to Download Forms >> Service Forms >> Select Regional Language – **Customer Authorization Letter – Policy Owner Servicing Request Version 1.0**

- **List of Operational CAMS Branches**

Go to Customer Service >> Get In Touch >> Service Options – CAMS>> **CAMS Branches**

- **List of Operational PNB MetLife Branches**

Go to Contact Us >> Select the nearest Branch >> **Enter State, City, Area as per your preference**