

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 – Surrender/Full Withdrawal - Fund Transfer

Definition: Surrender Fund Transfer is an Option given to the Policy owner to Surrender the policy and transfer the surrender value as applicable towards another policy of the same customer.

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 Note: For Fund Transfer requests, new application number to be mandatorily mentioned	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 with Original Policy Document, following additional document of PO is required: 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	<p>If request submitted by Third Party with Indemnity bond / Duplicate PD, following additional document of PO is required:</p> <p>1. Copy of latest Bank Statement having account number same as provided at the time of Proposal Login OR</p> <p>2. Copy of Bank Statement reflecting premium paid to PNB MetLife OR</p> <p>3. Original ID proof same as provided at the time of Proposal Login of the policy owner</p> <p>Note: For cases where, Sum Assured is equal to 5 lakhs and more, then surety need to be signed in the indemnity bond. Also, Indemnity bond to be duly witnessed</p>	No	No	Yes		
7	<p>Self-Attested Address Proof of PO</p> <p>Note : Mandatory only in case of Indemnity/DPD requests or where there is an address change</p>	Yes	Yes	Yes		
8	<p>Policy Owner Authorization Letter and ID proof of the person submitting the request on behalf of Policy Owner</p>	No	No	Yes		

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

- **Financial Payout Request Form Version 1.0 for submission of the above mentioned service request**

Go to Download Forms >> Service Forms >> Select Regional Language – **Financial Payout Request Form Version 1.0**

- **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**