

Kotak Life Insurance :: Customer Policy Servicing & Claim Forms



Policy Servicing Forms

- Application Form For Policy Alterations
- Adjustment of Premium from LSI/Top-Up Form
- Application for free look cancellation/alteration
- Application for Funds Switch
- Invest Maxima – Fund Switch Form
- Application for Premium Re-direction
- Application of Top-Up Premium
- Assignment Form
- Contact Details Updation Form
- ECS / Direct Debit Form
- Preferred ECS Debit Date Application Form
- Consent For Deactivation of Auto Debit Instruction Request
- HDFC Standing Instruction Form
- Indemnity cum Affidavit for Issuance of Duplicate Policy
- Kotak Bank Standing Instruction Form
- Maturity Form
- Nomination/Appointee Addition Application
- Partial Withdrawal Form
- Policy Loan Form
- Surrender request
- Kotak Credit Card Debit Authorization Form
- Request for Major Revival of Policy Form

Individual Claim Forms

- Death Claim Intimation Form
- Rider Claim Intimation Form
- Medical Questionnaire / Physician Statement
- Affidavit cum Indemnity in case of lost policy document
- List of Acceptable KYC Documents (already posted under forms section)
- Critical Illness Questionnaires
- Group Claim Forms
- Death Claim Intimation Form
 - Employer – Employee
 - Credit Policies
 - Micro Insurance
- Rider Claim Intimation Form
- Medical Questionnaire / Physician Statement
- Upfront Beneficiary Letter
- Discharge Voucher
 - Employer – Employee
 - Credit Policies
 - Social Sector
- Policyholder's Declaration
- Nominee Declaration on Employer Letterhead
- Affidavit cum Indemnity in case of lost certificate of insurance
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