

## CRITICAL CONNECT PROPOSAL FORM

Proposal No.:

URN: LH007V22019

### GUIDELINES TO FILL THE FORM

- Please answer all the questions completely. If a particular question is not applicable to you please mark that question as not applicable "N/A".
- Please attach extra sheets wherever the space is insufficient to provide the additional underwriting information. Put a (✓) mark wherever applicable.
- Kindly contact the Company's Office or Intermediary for any doubts or clarifications on the Proposal Form.

GOING GREEN JUST GOT EASIER!!! SAVE PAPER. SAVE TREES.

CONSENT FOR ELECTRONIC DISPATCH OF POLICY PACK

☐ I want to Save Trees and Contribute to the Environment. Therefore, I hereby authorize Liberty General Insurance Limited to provide me Electronic Policy Pack. I understand, subscribing to Electronic Policy Pack means, the policy pack will only be sent to my registered email id and no physical policy pack will be sent across.

The acceptance of the proposal is subject to receipt of the total premium and realization of payment will be as per the policy terms and conditions. Kindly fill the form completely in CAPITAL LETTERS to help us to serve you better. The Company is under no obligation to accept this Proposal. Receipt of this Proposal by the Company along with the premium payment & medical reports, if applicable, does not tantamount to the acceptance of the Proposal by the Company and does not result in a concluded contract of insurance. Coverage is as per the terms and conditions of our Standard Policy Wordings. The Policy shall become voidable at the option of the Insurer, in the event of any untrue or incorrect statement, misrepresentation, non-description, failure to disclose or suppression of any material facts in response to the questions in the proposal form or on non-disclosure of any material particular.

### 1. Proposer Details

Proposer (Mr / Mrs / Ms) :	Last Name	First Name	Middle Name
Address :			
City/Town :	State :		
District :	Pin Code :		
Telephone :	Mobile :		
E-mail :			
Date of Birth :	Gender :		
Nationality:	Marital Status:		
Annual Income:	Educational Qualification:		

Confirmation for Issuance of e-Insurance Policy:

E Insurance account no.: I would like to open E insurance account with Insurance Repository.

PAN Number:	
Aadhar Number:	GSTIN:

### 2. Proposal Details

Business Type: New ☐ Renewal ☐ Rollover ☐ Policy Tenure: 1 Yr ☐ 2 Yrs ☐ 3 Yrs ☐

Plan: Plan A Options 9CIs ☐ 25CIs ☐ 43CIs ☐ Plan B Options Heart Protect ☐ Cancer Protect ☐ RenoLiv Protect ☐ Brain Protect ☐

Optional Cover: Loan Protector Cover ☐ 30 Days Survival Period ☐

Sum Insured: Plan A ☐ ☐ ☐ ☐ ☐ ☐ ☐ ☐ Plan B ☐ ☐ ☐ ☐ ☐ ☐ ☐ ☐ Installment Option YES ☐ NO ☐

If Yes, Monthly ☐ Quarterly ☐ Half-yearly ☐

Proposed Policy Period: From  To

### 3. Loan Account Details:

Bank/Financier Name:

Loan Account Number:  Loan Amount:

Type of Loan:  Applicant Status:  Loan Tenure:  EMI Amount:

Proposed Cover (s):

	Proposed Insured I	Proposed Insured II	Proposed Insured III	Proposed Insured IV	Proposed Insured V
Name					
Relationship with proposer	Relationship with proposer	Relationship with Insured I	Relationship with Insured I	Relationship with Insured I	Relationship with Insured I
Gender					
Date of Birth	D D M M Y Y Y Y	D D M M Y Y Y Y	D D M M Y Y Y Y	D D M M Y Y Y Y	D D M M Y Y Y Y
Height ( cm)					
Weight ( Kg)					
Occupation					
Nominee/Assignee Name					
Relationship of Nominee/Assignee					
Nominee/Assignee Address					
Please affix photograph of the member/s proposed to add in the Policy:	photograph of member 1	photograph of member 2	photograph of member 3	photograph of member 4	photograph of member 5

Note : In case of additional member/s' please share all above detail in a separate document.

#### 4. Medical & Lifestyle Information

1. Does any person, proposed to be insured, suffered from/ suffering from any disease/illness /Injury	Yes <input type="checkbox"/>	No <input type="checkbox"/>
2. Does any person, proposed to be insured, suffer from or have been treated for any heart related ailment/ Diabetes/Cancer /Hypertension?	Yes <input type="checkbox"/>	No <input type="checkbox"/>
3. Does any person, proposed to be insured, suffer from Paralysis/Asthma/Epilepsy?	Yes <input type="checkbox"/>	No <input type="checkbox"/>
4. Is any person, proposed to be insured, receiving any treatment/medication or have in the past received treatment or undergone surgeries for any medical condition/disability?	Yes <input type="checkbox"/>	No <input type="checkbox"/>
5. Is the person, proposed to be insured positive for HIV/AIDS (Please attach the relevant consultation documents and blood investigation reports)	Yes <input type="checkbox"/>	No <input type="checkbox"/>

Sr. No	Name of the Proposed member	Name of illness/injury suffering from or suffered in the past	Date of first diagnosed/detected	Treatment/medication received/ receiving	Details of Hospitalization ( If any)	Is it fully cured
1						
2						
3						
4						
5						

Habits	Proposed Insured I	Proposed Insured II	Proposed Insured III	Proposed Insured IV	Proposed Insured V
Smoking (Quantity per day)	No. of cigarettes	No. of cigarettes	No. of cigarettes	No. of cigarettes	No. of cigarettes
Hard Liquor/Wine/Beer (Quantity per week)	Quantity in ml	Quantity in ml	Quantity in ml	Quantity in ml	Quantity in ml
Pan masala/Guthka (Quantity per day)	No. of packets	No. of packets	No. of packets	No. of packets	No. of packets
Tobacco (Quantity per day)	Quantity in grams	Quantity in grams	Quantity in grams	Quantity in grams	Quantity in grams
Others (Quantity per day)	Name & Quantity	Name & Quantity	Name & Quantity	Name & Quantity	Name & Quantity

### 5. Additional Information (If any)

Since when are you continuously insured? (Date of first inception policy)

[illegible]

Do you want us to consider above details for Portability? Yes ☐ No ☐

Instrument Type (Cash/Cheque/DD/Others)	Name of the premium payer	Bank Name	Cheque Date	Amount in Rs

[illegible]

Yes ☐ No ☐

## CRITICAL CONNECT PROPOSAL FORM

If yes, please provide details: \_\_\_\_\_

Please provide Permanent Account Number (PAN) if premium amount exceeds Rs. 1 Lac \_\_\_\_\_

☐ I/We hereby declare that the premium for the said policy is paid out of the legally declared and assessed sources of my/our income  
OR

☐ I/we hereby declare that the premium is paid from the Bank Account of Mr. /Ms. \_\_\_\_\_ the payment is allowed under the  
Income Tax Act 1961 and there is insurable interest with the payee.

### 8. Checklist of Documents

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

1. **ID Proof:** Passport ☐ PAN Card ☐ Voter's Identity Card ☐ Driving License ☐ National Identity Number ☐

2. **Residence Proof:** Telephone Bill ☐ Electricity Bill ☐ Bank Account Statement ☐ Ration Card ☐

3. **Age Proof:** Any proof of age

### For Portability cases

1. Photocopies of previous policies and endorsements
2. Portability Form
3. Renewal Notice with claims details.

### Important Note:

The Company will have no liability until the proposal is accepted by the Company and communicated to the proposer on receipt of full premium against the proposal.

### 9. Declaration

I/We hereby declare, on my behalf and on behalf of all persons proposed to be insured, that the above statements, answers and/or particulars given by me 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.

I understand that the information provided by me will form the basis of the 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 of the premium chargeable.

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 Company.

I/We declare that I/we consent to the Company seeking medical information from any doctor or hospital who/which at anytime has attended on the person to be insured / proposer or from any past or present employer concerning anything which affects the physical or mental health of the person to be insured/proposer and seeking information from any insurer to whom 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/We authorize the company to share information pertaining to my/our proposal including the medical records of the insured/proposer for the sole purpose of proposal underwriting and / or claims settlement and with any Governmental and / or Regulatory authority.

I/We hereby provide my/our consent in accordance with Aadhar Act, 2016 and Prevention of Money Laundering Act and rules/regulations made thereunder for validating/authenticating my/our Aadhar details and updating the same in all my policies held with the company

\_\_\_\_\_ Date

\_\_\_\_\_ Signature of Proposer

### DECLARATION BY INTERMEDIARY/PROPOSER

I, the intermediary/ proposer hereby declare and confirm that I have explained/understood the features, terms and conditions of the policy and question contained in the proposal form, I have also explained/ understood that the answers to the questions contained in the proposal form, forms the basis of the contract of insurance. If any information/statement given in proposal is found to be untrue, the policy shall be treated as void ab initio and the premium paid shall be forfeited to the Company.

IMD Name: \_\_\_\_\_

Proposer name: \_\_\_\_\_

IMD Code: \_\_\_\_\_

Proposer sign: \_\_\_\_\_

IMD Sign\*:

\*Stamp in case of Company

### DECLARATION IN CASE THE PROPOSER IS ILLITERATE OR PROPOSAL FORM IS IN LANGUAGE OTHER THAN UNDERSTOOD BY PROPOSER

(To be signed by person who has explained the contents of the proposal form to the Proposer)

I, the declarant / proposer hereby declare and confirm that I have explained/understood the contents of the proposal form in \_\_\_\_\_ language understood by proposer/me and proposer have affixed his/her signature/thumb impression on the proposal form only after understanding the contents thereof.

Declarant's Name: \_\_\_\_\_

Proposer Name: \_\_\_\_\_

Signature: \_\_\_\_\_

Signature / thumb impression

**Statutory Warning: Prohibition of Rebates as per Section 41 of the Insurance Act 1938 (4 of 1938)** 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 in respect of 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. Violations of Section 41 of the Insurance Act 1938, as amended, shall be - Any person making default in complying with the provisions of this section shall be liable for a penalty which may extend to ten lakhs.

## CRITICAL CONNECT PROPOSAL FORM

### 10. FOR OFFICE USE ONLY

<b>Intermediary Name:</b>	<b>Intermediary Code:</b>
<b>Sales Manager Name:</b>	<b>Sales Manager Code:</b>

### 11. RECEIPT OF ACKNOWLEDGEMENT

**Application No:**

**Date:**

We acknowledge with thanks the receipt of your application and amount by Cash/Cheque/Demand Draft/Others \_\_\_\_\_ of the amount of Rs. \_\_\_\_\_ dated \_\_\_\_\_ drawn on \_\_\_\_\_.

The Company will have no liability until the proposal is accepted by the Company and communicated so to the proposer and on receipt of full premium against the proposal.

**Please note the following:**

1. This acknowledgment letter confirms only receipt of premium towards insurance policy. Issuance of this receipt neither confirms assumption of risk nor guarantees issuance of policy.
2. Assumption of risk is subject to realization of full premium amount and acceptance of risk in form of issuance of an insurance policy as per underwriting policy of the Company.
3. In case premium is not realized by the company due to any reason, Company shall not be on cover and contract of insurance shall be treated as void ab-initio.
4. In the event of any refund of premium or claim amount being payable under the policy, the same shall be paid directly to the Proposer/Insured/Nominee (as applicable), as per the details mentioned in duly filled proposal form.

Signature of the receiver & office Seal

**Liberty General Insurance Limited**

Registered Office: 10th Floor, Tower A, Peninsula Business Park, Lower Parel, Mumbai - 400013