

APPLICATION FOR TOP-UP PREMIUM

INSTRUCTIONS FOR FILLING UP THE FORM

Conditions to be read before filling the form : 1. This form needs to be filled by the Policyholder himself/herself in BLOCK LETTERS in black or blue ink. 2. If this application form is received by 3.00 p.m. on a trading day, units shall be bought at the applicable price declared on the same day. 3. If the application form is received after 3.00 p.m. on a trading day, units will be bought at the applicable price declared on the next trading day. 4. The policy holder must sign on cancellation or alteration. 5. This application will not be effective until it is officially accepted by Kotak Mahindra Old Mutual Life Insurance Limited.

1. PARTICULARS OF THE POLICYHOLDER

CLIENT ID

FULL NAME OF POLICY OWNER

Title Surname First name Middle name

2. PARTICULARS OF LIFE INSURED

CLIENT ID (For existing Kotak Life Insurance policyholders)

FULL NAME (Please leave a gap between each part of the name)

Title Surname First name Middle name

Is the life insured presently in good health? (Applicable for Kotak Capital Multiplier Plan) Yes No

If, No, please give details.

3. PARTICULARS OF TOP-UP PREMIUM

Policy No : NAME OF THE PLAN :

MODE OF PAYMENT : Cheque/DD Cash (Should you choose to pay premium by cash, you are advised to do so at the nearest Kotak Life Insurance branch only.)

BANK NAME WITH BRANCH LOCATION ACCOUNT NO.

Cheque/DD No.	Dated	Amount (in Rs.)	Drawn on (Name of bank and branch)
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

4. ALLOCATION OF TOP-UP PREMIUMS TO INVESTMENT PORTFOLIOS (Total must be equal to 100%)

% Of Allocation	Fund Code	Fund Name
<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>
100 %		Total

5. DECLARATION BY THE POLICYHOLDER

Place Date

Signature / thumb impression of the life to be insured (or Guardian, if the life to be insured is a minor)

Signature / thumb impression of the policyholder (if different from the life to be insured)

FOR OFFICE USE ONLY

Branch Name : Branch Code :

Name of Branch Co Ordinator : Date of Receipt of Form at Branch :

Call ID : Time of Receipt of Form at Branch :

Kotak Mahindra Old Mutual Life Insurance Ltd.
Regn. No. 107, Regd. Office : 9th Floor, Godrej Coliseum, Behind Everard Nagar, Sion (East), Mumbai - 400 022.
Insurance is the subject matter of the solicitation.

ACKNOWLEDGMENT

Branch Name : Branch Code :

Name of Branch Co Ordinator : Date of Receipt of Form at Branch :

Call ID : Time of Receipt of Form at Branch :

Fund available for Top-Up

Plan Name	Product Code	Kotak Opportunity Fund		Kotak Bond Fund	Kotak Gilt Fund	Kotak Growth Fund	Kotak Aggressive Growth Fund	Kotak Floor Fund	Kotak Floating Rate Fund	Kotak Money Market Fund	Pension Bond Fund	Pension Opportunity Fund	Pension Floor Fund	Money Market Fund	Floating Rate Fund	Gilt Fund	Bond Fund	Balanced Fund	Dynamic Floor Fund II	Frontline Equity Fund	Classic Opportunities Fund	Guarantee Fund	Pension Money Market Fund II	Pension Bond Fund II	Pension Balanced Fund II	Pension Floor Fund II	Pension Frontline Equity Fund	Pension Classic Opportunities Fund	Pension Guarantee Fund
		KOPF		KBDF	KGLF	KGRF	KAGF	KFLF	KFRF	KMMF	KBDF	KOPP	KFLP	FMMF	FFRF	FGLF	FBDF	FBLF	FFLF	FFEF	FCOF	FGRF	PMMS	PBDF	PBLF	PFLF	PFEF	PCOF	PGRT
Kotak Easy Growth Plan-5 Times	KEG3	KOPF		KBDF	KGLF	KGRF	KAGF	-----	KFRF	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----
Kotak Easy Growth Plan-1.25	KEG4	KOPF		KBDF	KGLF	KGRF	KAGF	-----	KFRF	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----
Kotak Safe Investment Plan - Low cover	K01A	-----		KBDF	KGLF	KGRF	KAGF	-----	KFRF	KMMF	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----
Kotak Safe Investment LPP - Low cover	K01B	-----	KBLF	KBDF	KGLF	KGRF	KAGF	-----	KFRF	KMMF	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----
Kotak Safe Investment Plan - High cover	K01C	-----	KBLF	KBDF	KGLF	KGRF	KAGF	-----	KFRF	KMMF	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----
Kotak Safe Investment LPP - High cover	K01D	-----	KBLF	KBDF	KGLF	KGRF	KAGF	-----	KFRF	KMMF	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----
# For Old Kotak Safe Investment Plans who Opted to switch to new funds prior to March 15, 2010	K01	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	FFEF	-----	FGRF	-----	-----	-----	-----	-----	-----
Kotak Flexi Plan / Kotak Flexi Plan LPP	K02A / K02B	-----	KBLF	KBDF	KGLF	KGRF	KAGF	-----	KFRF	KMMF	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----
Kotak Flexi Plan (before guidelines)	KFP1, KFP2, KFP3, KFP4	-----	KBLF	KBDF	KGLF	KGRF	KAGF	-----	KFRF	KMMF	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----
Kotak Retirement Plan Single Prem (Unit Linked)	K04A	KOPF	KBLF	KBDF	KGLF	KGRF	-----	-----	KFRF	KMMF	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----
Kotak Retirement Plan With Cover (Unit Linked)	K04B	KOPF	KBLF	KBDF	KGLF	KGRF	-----	-----	KFRF	KMMF	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----
Kotak Retirement Plan Without Cover (UnitLinked)	K04C	KOPF	KBLF	KBDF	KGLF	KGRF	-----	-----	KFRF	KMMF	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----
Kotak Retirement Income Plan (Unit Linked) Single Premium (before UL guidelines)	KRI 1	-----	KBLF	KBDF	KGLF	-----	-----	-----	KFRF	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----
Kotak Retirement Income Plan - Unit Linked With Cover (before UL guidelines) Kotak Retirement Income Plan- Unit Linked Without Cover (before UL guidelines)	"KRI 2 KRI3"	-----	KBLF	KBDF	KGLF	-----	-----	-----	KFRF	KMMF	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----
HeadStart Future Protect -Single Life/ Joint Life	K05A, K05B, K05C, K05D	KOPF	KBLF	KBDF	KGLF	KGRF	KAGF	KFLF	KFRF	KMMF	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----
HeadStart Assurewealth-Single Life/ Joint Life	K06A, K06B, K06C, K06D	KOPF	KBLF	KBDF	KGLF	KGRF	KAGF	KFLF	KFRF	KMMF	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----
# For Old Headstart Plans who Opted to switch to new funds prior to March 15, 2010	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----
Kotak Platinum Advantage Shield / Dynamic / Risk	K08A, K08B, K08C		KBLF	KBDF	KGLF	KGRF	KAGF	KFLF	KFRF	KMMF	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----
Kotak Pit Adv Plus Shld double / Single	K17A, K17B, K17C	KOPF	KBLF	KBDF	KGLF	KGRF	KAGF	KFLF	KFRF	KMMF	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----
Kotak Smart Advantage - Regular / Limited	*K12A, K12B*	KOPF	-----	KBDF	-----	-----	-----	KFLF	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----
Kotak Long Life Secure Plus - Regular/ Limited/ Inbuilt Benefit	*K13A, K13B, K13C*	KOPF	KBLF	KBDF	KGLF	KGRF	KAGF	KFLF	KFRF	KMMF	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----
Kotak Long Life Wealth Plus - Regular / Limited	*K14A, K14B*	KOPF	KBLF	KBDF	KGLF	KGRF	KAGF	KFLF	KFRF	KMMF	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----
# For Old Long Life Plans who Opted to switch to new funds prior to March 15, 2010	K13, K14	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----
Kotak Secure Retirement Plan	K18A	-----	KBLF	KBDF	KGLF	KGRF	KAGF	-----	KFRF	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----
Kotak Second Innings Plan	K19A	-----	-----	-----	-----	-----	-----	-----	-----	-----	KBDF	KOPP	KFLP	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----
# For Old Second Innings Plans who Opted to switch to new funds prior to March 15, 2010	K19A	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	FFLP	FFEP	FCOP	-----
Kotak Single Invest Plan(5xSP)	K20	No Top Up	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----
New HeadStart Future Protect-Single Life/ Joint Life	K27, K28	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	FMMF	FFRF	FGLF	FBDF	FBLF	FFLF	FFEF	FCOF	-----	-----	-----	-----	-----	-----	-----	-----
New Kotak Long Life Secure Plan	K29, K30	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	FMMF	FFRF	FGLF	FBDF	FBLF	FFLF	FFEF	FCOF	-----	-----	-----	-----	-----	-----	-----	-----
Guaranteed Pension Builder	K24	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	FMMF	-----	-----	-----	-----	-----	FGRP
Kotak Super Advantage	K31	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	FBDF	-----	FFLF	FFEF	FCOF	-----	-----	-----	-----	-----	-----	-----	-----
Kotak Platinum Edge	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	FBDF	-----	FFLF	FFEF	FCOF	-----	-----	-----	-----	-----	-----	-----	-----
New Kotak Single Invest	K33	No Top Up	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----
New Kotak Second Innings	K32	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	FMMF	FDBP	FBLP	FFLP	FFEP	FCOP	-----
New Kotak Safe Investment Plan II	K34	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	FMMF	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----

* Incase of Kotak Safe Investment Plan II 'Frontline Equity Fund' is available only when guarantee falls off.